

ALERT!

MARKETING RESEARCH ASSOCIATION

“Research quality is job one. MRA’s Code is step one to go there.”

**JAY WHITE, CEO
BALTIMORE RESEARCH
MEMBER, MRA STANDARDS
& ETHICS COMMITTEE**

FOURTH QUARTER 2015 · VOL. 55 · NO. 4

7 WAYS TO SHORTEN TIME-TO-INSIGHT WITH RESPONDENT TARGETING

7 TENETS FOR UNDERSTANDING BRANDS FROM THE CONSUMER PERSPECTIVE

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Upcoming Conferences

January 25-27, 2016
CEO Summit
South Beach

May 18-20, 2016

MRA Insights & Strategies Conference
New Orleans

Industry news and announcements are now shared exclusively on www.marketingresearch.org. Have news to share? Contact Jess Forrester at jess@marketingresearch.org.



Cover: Baltimore Research CEO Jay White moonlights as a current member of MRA's Standards & Ethics Committee, having even served for the last several years as the Committee's Chairman. White is a passionate proponent on behalf of MRA's *Code of Marketing Research Standards*, which defines 42 principles all MRA members must follow. It's online at www.marketingresearch.org/Code.

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Who Doesn't Like a Good Quote...or Four?

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"And now we welcome the New Year, full of things that have never been."¹

As we head into the final stretch of each year, it's human nature to reflect on what has been and what is to come. For the Marketing Research Association, and the industry at large, there is reason for much celebration... and some trepidation.

Above all else, MRA has a passion for advocacy on behalf of the industry, which is at the heart of everything we do. As is stated on our website and as a guiding light for the board of directors, all of the other amazing volunteers, and staff: MRA's goal is the acceptance, appreciation and growth of marketing research as an industry and as a profession. This can be accomplished several ways, including advocating for the professionalism of marketing research through the education and certification of marketing research professionals, through the development and enforcement of industry standards, identification and promulgation of best practices, making the definitive business case for the value of marketing research, promoting and protecting marketing research in legislative, regulatory and judicial forums, and improving the image of marketing research among the general public and business community.

One of the things I've always appreciated most about MRA is that as a non-profit organization, all of its revenues are reinvested back into our profession, directly enriching researchers and others careers.

For the profession, 2015 brought a whole new meaning to many methodological-

specific areas including "digital" as it applies to marketing research and an ever increasing demand to get online research "right." You can't throw a stone without hitting someone talking about storytelling. And, oh, how we love to talk about behavioral economics, emotion measurement, DIY, social media/ Web analytics and Big Data. These are important topics that only skim the surface. Understanding, embracing and implementing them (and others) is no small task and should not be minimized.

MRA continued to strive to provide compelling education that encompasses the collective needs of the industry through its conferences, webinars, this publication, a new website platform, etc. These were large undertakings that required constant strategic mindsets in order to optimize. And, yep; we used a variety of research to uncover insights and to drive decision-making.

Additionally, our government affairs team, led by MRA's own industry advocate, director of government affairs and all-around fantastic human being, Howard Fienberg, worked tirelessly to promote and protect marketing research in legislative, regulatory and judicial forums, including but not limited to: funding for the 2020 Census and American Community Survey (which is not looking so good);² cross-border data flows that are threatened by data localization laws³ (not just the loss of the U.S.-EU Safe Harbor);⁴ the new TCPA restrictions on telephone research⁵; federal data security legislation;⁶ a variety of state-specific laws⁷; and many, many other areas that all researchers should care about.

2 www.marketingresearch.org/article/census-setbacks-both-side-congress-fy2016-funding-deadline-nears

3 www.marketingresearch.org/article/international-data-flows-data-localization-laws-rise

4 www.marketingresearch.org/article/transfers-personal-data-us-eu-post-safe-harbor-world-tips-navigating-uncharted-waters

5 www.marketingresearch.org/tags/tcpa

6 www.marketingresearch.org/tags/data-security

7 www.marketingresearch.org/issues-policies/legal-affairs

"Perhaps that is where our choice lies – in determining how we will meet the inevitable end of things, and how we will greet each new beginning."⁸

I became a member of MRA in 1995 when Jane Rosen and the late Mimi Nichols signed me up – even though I knew very little about the association at that time. Since then, I've completed at least 20 survey questions that ask something along the lines of, "What is the greatest value you receive (or look for) as a member of MRA?" And my personal truth and answer has always been, "the protection of our industry." Therefore, it's no surprise that much of my focus as a staffer has been with the Standards and Ethics Committee (SEC). Most recently, a new SEC convened to work on updating the Respondent Bill of Rights⁹ (expected in January of 2016) and FAQs for a wide range of general business issues and best practices. This committee is dedicated to promoting an ethical culture in the marketing research profession where principles of honesty, professionalism, fairness and confidentiality combine to support the profession's success. I might add that they're simply an impressive group of really big brains! We think you'll agree:

- **Cathy Scott, PRC**, Kimberly-Clark Corporation – Chair
- **Ivy Boehm**, Chicos FAS – Board Liaison
- **Jay White, PRC**, Baltimore Research – Immediate Past Chair and current Advisor
- **Amy Shields, PRC** – Advisor
- **Nancy Herson, PRC**, G3 Translate
- **Jane Mount, PRC**, Libran Research & Consulting
- **Bob Graff**, MarketVision Research
- **Carol Shea**, InsightsCentral, Inc.

In recognition of Jay White's tremendous efforts over the last four years as the chair of this oft behind-the-scenes committee, including a 17-month review in 2012-2013 which resulted in a landmark revision to the *MRA Code of Marketing Research Standards* (the *Code*)¹⁰ in October of 2013, we decided to highlight him as our man of the hour on the cover of this issue of *Alert!*. He really was kicking and screaming in opposition to this special acknowledgement, which we basically just ignored. Everyone

8 Elana K. Arnold, *Burning*

9 www.marketingresearch.org/issues-policies/best-practice/respondent-bill-rights

10 www.marketingresearch.org/issues-policies/mra-code-marketing-research-standards

1 Rainer Maria Rilke

reading this should be grateful for Jay's dedication, passion and execution. His day job is as CEO of Baltimore Research, but as 2015 comes to a close, we raise our glass and toast our most sincere gratitude for Jay White's continuing contributions to the industry.

"The chief beauty about time is that you cannot waste it in advance. The next year, the next day, the next hour are lying ready for you, as perfect, as unspoiled, as if you had never wasted or misapplied a single moment in all your life. You can turn over a new leaf every hour if you choose."¹¹

What a lovely way to look at and to the future. With this in mind, – although I certainly don't feel that a single moment of my life has been wasted during my time at MRA – effective December 11, I will no longer be acting in the capacity of MRA's director of research as, instead, I embark on a new and different stage of my career. (Stay tuned for announcements on MRA's website that I, as a member, will ask the association to include as industry news and announcements¹² in January!) I will, however, be continuing as the editor for *Alert!*, which I couldn't be more excited about. And, of course, it is with a happy heart that I look to the future as a proud and active advocate for MRA.

As mentioned, my alliance with MRA began 20 years ago. In a world full of options and clutter, MRA has always stood out to me as the premier association that *best serves and protects the marketing research industry*. It's always been my *chosen* community and is directly responsible for providing me with endless personal and professional growth and for introducing me to truly wonderful people who I now count among my best of friends.

Finally, it would feel dismissive to not acknowledge and thank the hardest working staff, board of directors and volunteers for all that they have taught me, the unimaginable laughter and tears that we have shared, and most of all – for their valued counsel and friendship. I look forward to a healthy, continuing and rewarding relationship with you all...long into the future.

"Toto, I have a feeling we're not in Kansas anymore."¹³ ▼

Amy Shields, PRC can be reached at amy.shields@marketingresearch.org.

11 Arnold Bennett

12 www.marketingresearch.org/tags/industry-news

13 L. Frank Baum

MR Is at a Social Responsibility Crossroads

By Jim Bryson

We have come to a crossroads. Which way shall we go?



At the Market Research Society Conference in March, Research-Live.com reported that Unilever CEO Paul Polman urged the industry to get involved in larger societal issues. He stated that we are in a "leadership moment for the market research profession" and that "by prioritizing social issues, business success will follow." Mr. Polman challenged the audience to realize that "business as usual is not the answer."

Historically, "business as usual" dictated that a corporation should generate increasing earnings for its shareholders. With some exceptions, the view was that the shareholders used the earnings in whatever manner they preferred, including gifts to charity or affecting the societal issues of the day. The business focused on earning profits; shareholders were responsible for distributing/spending profits.

For several years now, we have heard about the Millennial workforce's desire for an activist workplace where volunteering and social activism were valued. Now, we hear the CEO of the world's third largest CPG company stating that social issues "lead to" – rather than "are a result of" – business success. Mr. Polman suggests that corporations have a social responsibility first and a shareholder responsibility second and appears to have a two-fold purpose: (1) to activate companies to be more socially responsible, and (2) to use social responsibility as a strategy leading to greater business success. Both are significant diversions from the traditional role of companies.

So, which road shall we take? Should companies (and researchers) continue to focus almost exclusively on providing increasing returns to shareholders or should they take the road less traveled and put first priority on being socially responsible?

Each company (and researcher) must decide for itself. The two options are distinctly different. Which way will you choose?

Paul Polman's raising of this issue coincides with another industry initiative to bring a sense of community and social activism to the MR industry. In January, a group of researchers formed the Marketing Research Education Foundation (MREF). It is an independent foundation with a mission to, "unify, inspire and activate the marketing research community to focus its collective resources to educate children worldwide." The founding board members are: Steve Schlesinger, Carla Lindeman, Ed Sugar, Steve Quirk, Don Marek, Howard Gershowitz and myself.

MREF debuted at the Quirks Event in Brooklyn in February where it presented a check for \$5,000 to Opportunities for a Better Tomorrow, a New York-based non-profit dedicated to the training and education of disadvantaged youth. In honor of MRA's role in establishing MREF, another \$5,000 contribution was made to Southside Early Childhood Center in St. Louis at MRA's Corporate Researchers Conference (CRC). Another MREF grant went to Children of Hope School in Thomazeau, Haiti, a school of 200 children in a very poor part of that country.

In 2016, MREF hopes to step up its programs with grants, service days and a significant service trip for researchers to travel and serve together. You will hear more about these initiatives in the coming weeks.

Whether you are Unilever or a home-based researcher, the prioritization of social responsibility is a decision you will have to make. You are at a crossroads. Which road will you take?

Jim Bryson is a director at large on MRA's Board of Directors and is founder and CEO of 20|20.

The Year Ahead

By Vaughn Mordecai, PRC



Many of you know that I am a soccer (football) coach and that I spend quite a bit of time on soccer fields in my hometown. The other day, I was training at a camp for local high school soccer players. Several of us were standing together watching players to see what the upcoming squads would look like. As we were watching, a ball was passed (right to left) from one player to another that was positioned in front of the goal. The player receiving the ball had played soccer for over 10 years and was very skilled. With only the goalkeeper to beat and very little distance between the player and the goalie (about 10 feet), he kicked the ball wide of the net and completely missed his opportunity to score.

The challenge that this player faced? He tried to shoot the ball with his right foot instead of his left. The mechanics of striking

this particular shot with a right foot is likely to carry the ball wide of the goal about 90 percent of the time, so it didn't surprise us (too much) that he missed. He had *no left foot* (he actually has a left foot but refuses to use it). One of my fellow coaches who saw the fail turned to me and said, "that's what we call playing the piano with just one arm."

I'm very enthusiastic about this board year. There's so much to do, but so much energy around it. We held our first "official" meeting at the 2015 Corporate Researchers Conference (CRC) in St. Louis and it was excellent. One of the first items that we addressed was to place the board members as liaisons to the MRA committees. We added four, very active, board members this year that we are *extremely* excited about. Please welcome:

- **Ginny Kevorkian, PRC**, Manager of Research and Planning – Beacon Health Systems
 - **Ivy Boehm**, Senior Director, Consumer Insights – Chico's FAS
 - **Kathryn Korostoff**, President – Research Rockstar
 - **Tim Hoskins**, President – Quester
- Each of the board members has an assignment. Whether it be to participate with the chapters, event programming, marketing, strategy, etc., they all play an integral part. No one-armed piano players here (not that there's anything wrong with *actually* being a one-armed piano player... in fact, quite impressive if you are or know someone who is).

There's an exhilarating year ahead planned. More details and "save-the-dates" will be found in this and the next issue of *Alert!*, but the CEO Summit is January

25-27 in South Beach¹ (a great opportunity to get out of the cold). For the Insights and Strategies Conference (ISC), we are headed to New Orleans, May 18-20. And the Corporate Researchers Conference (CRC) will be in September. Now is a really good time to get these conferences on your calendar and into your 2016 budgets. MRA is holding some of the greatest conferences, with the best attendance, in the industry. I'm sure they'll be a blast.

It's a real honor to serve the industry and each of you this year in the capacity of Chairman of the Board. Please reach out to any board member² or MRA staff³ if you have any questions, suggestions, want to volunteer or just have ideas on how to make our industry even better than it already is. We're here to serve you, we appreciate you and look forward to an action-packed year.

P.S. More to come in the upcoming months on the potential industry association consolidation between MRA and CASRO (yep...just mentioned it).⁴

Cheers! ▼

Vaughn Mordecai, PRC, is MRA's Chairman of the Board and professional services director Americas at bChannels, Inc. He can be reached at vaughn.mordecai@bchannels.com.

1 www.marketingresearch.org/conference/2016-ceo-summit-0

2 www.marketingresearch.org/about/governance/boards-committees

3 www.marketingresearch.org/about/staff

4 www.marketingresearch.org/article/joint-statement-casro-and-mra

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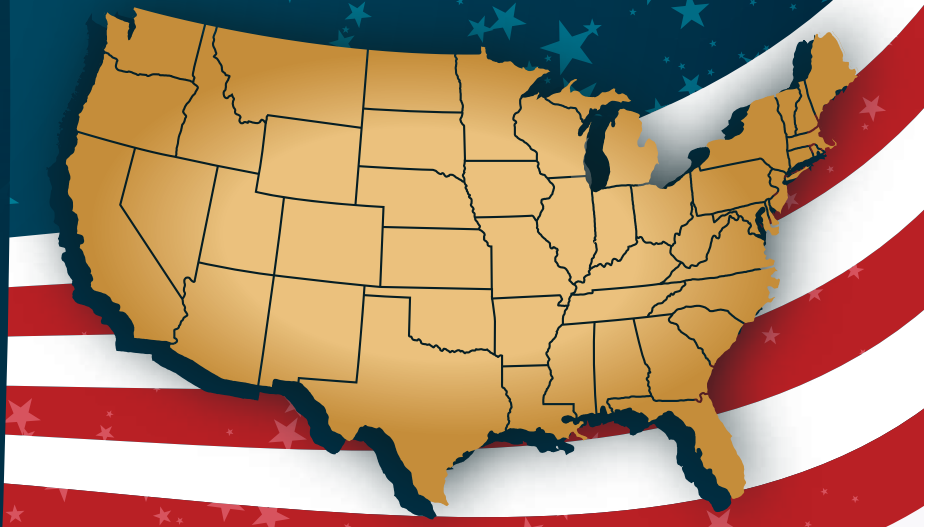
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Ways to Shorten Time-to-Insight with Respondent Targeting

By Allen Porter

When the success of a project depends on reaching exact quotas, accurate respondent targeting is critical to ensuring that the right constituents, customers and employees are being interviewed. While respondent targeting can be used with any data collection approach, it is most effectively used in tandem with phone-based data collection methods to deliver respondents with the specific demographics your research requires. Good respondent targeting goes well beyond the *who* you're going to call. It enables both sample managers to do *just-in-time* procurement and call center supervisors to determine the *where* and *when* to call, ensuring that study quotas are achieved, costs are minimized and the right respondents are recruited to reduce the need to weight the results.

The Benefits of Phone for Respondent Targeting

For groups with limited access to the Internet, online surveys may not be sufficient to recruit the right profile of respondents for the data to accurately reflect reality. Particularly for survey projects that require a broad demographic range, phone is critical to reach certain demographic groups such as seniors and rural or lower socioeconomic consumers.

At the same time, the number of people owning cell phones continues to grow, and many are increasingly abandoning landlines for mobile devices. In fact, calling cell phones has the added benefit of reaching the target respondent versus the household. Experience now indicates that cell phone users answer their phones at higher rates than they do landlines, speeding project delivery. It's clear that phone should not be overlooked as a prime way to target respondents.

Multi-Mode Surveys With Phone and Online Components

Multi-mode projects can be created to take advantage of phone for harder-to-reach groups while offering an online survey component for demographics who are more likely to complete the survey online. With a true multi-mode system, all respondent data, regardless of source, will be compiled seamlessly into one final data file so that researchers will never have to manually stitch the results together.

Screening Qualified Respondents

Workflows can be designed to pre-screen qualified respondents (like registered voters or women under 35) via interactive voice

response (IVR) prior to the call being passed over to a live interviewer. This will improve interviewer efficiency and help reduce the time each interviewer is required to spend on a call.

Handling Incoming Cell Phone Calls

People using cell phones are up to 10 times more likely to call back than people with landlines so, when qualified respondents call back, someone has to be available to take their call. With call blending capabilities, incoming calls from mobile devices can be answered quickly, reducing abandonment rates and helping to hit quotas faster.

Workflows can be designed to take the caller through IVR to screen or to answer the first set of questions or to simply route inbound calls to the next available interviewer.

Experience now indicates that cell phone users answer their phones at higher rates than they do landlines, speeding project delivery

There are several metrics that can be used for evaluating sample productivity, including four key measures:

- **Accuracy** – the percentage of working phone numbers or deliverable emails.
- **Contact Rate** – the percentage of calls made that reach a potential respondent.
- **Incidence** – the percentage of screened respondents who qualified (passed all screener questions).
- **Cooperation** – the percentage of qualified respondents who agree to take the survey to completion.

The methods below can affect these metrics to improve respondent targeting and general productivity. This can save you time and money, as well as improve overall respondent reach, thus providing higher quality data results. By accelerating your data collection, you can reduce the need for excessive weighting of the data on the back end and obtain accurate insights more rapidly.

1. Avoid losing respondents through call blending

When conducting an outbound phone study, a good practice is broadcasting a caller id number that, when dialed, reaches the call center. Having a caller id will significantly improve connect rates and help to get through some blocking technologies.

Sample Control

Sample management capabilities give project managers and supervisors complete control over the whole survey process. From building the sample to making changes on-the-fly, advanced sample management capabilities should include:

- Global time zone management capabilities.
- Capability of weighting / prioritizing sample in grouped calling areas.
- Replicating or grouping and treating segments differently based on predetermined rules.
- Sample assignments by hour to improve hit rates in each time.
- Ability to use elaborate dialing algorithms.

Call center success comes down to how well calls are managed. Workflows built using a combination of automated screening or IVR interviewing and live phone interviews give call center managers unprecedented control over optimizing respondent workflows.

We also know that cell phone respondents are 10 times more likely to return a phone call than landline respondents are. As the world moves toward greater cell phone dominance, managing these returned calls can be an important source of completes for capturing key targeted groups. With the right technology in place, returned calls can be answered by an IVR system which can then conduct the survey, play a message or (ideally) route to a live interviewer to conduct the survey.

2. Keep your targeting on track: universally manage your quotas

With the uncertainty surrounding TCPA regulations,¹ more call centers are choosing to split jobs between landline and cell phone sample to treat the calling differently. Essential in keeping your targeting on track and maintaining random sampling is to have your quotas universally managed. Trying to split quotas may lead to skewed targeting of specific demographic groups. However, if you can share quotas in real-time across the studies, then you can more precisely target your quota groups.

¹ "New U.S. Restrictions on Telephone Research Prompt Risk Management Debate: Do the new TCPA rules mean you should junk your autodialer?" www.marketingresearch.org/article/new-us-restrictions-telephone-research-prompt-risk-management-debate-do-new-tcpa-rules-mean

3. Make best use of resources – develop quota filling strategies

With survey-driven quotas, you may have situations in which respondents could potentially fill multiple cells. If you do not want them to fill all they can, then think about putting them in the quota group with the least completes. This is especially important with cells that have very different incidence rates. Looking at all of your “to go” counts and picking the quota with the highest need will help insure that you target those cells most effectively.

4. Omnibus surveys help maximize your productivity

Got a respondent on the phone? Keep ‘em going! Omnibus surveys that allow you to screen and collect data for multiple projects can be a way to maximize productivity and get the most out of targeted groups. The technology and study design can facilitate these projects by segregating the data and quotas between the surveys in your omnibus study.

5. Use referrals to build samples on the fly

Get referrals from respondents. Whether you have reached a respondent who does not qualify or one who did, if they can provide contact information for other

By accelerating your data collection, you can reduce the need for excessive weighting of the data on the back end and obtain accurate insights more rapidly

possible participants (co-workers, family or friends), take advantage of what is likely to be a highly accurate sample with a great incidence and cooperation rate. Let your respondents help you target and find respondents. If you collect referral sample, having good workflows in your project design and leveraging your technology to achieve these goals will save you time and help you to remain compliant with regulations like the TCPA. Ideally, the referrals can be added to your sample on the fly, but that also means that you should check against your do-not-call lists as you add the sample.

6. Weighting by time zone can help focus your interviewing resources

In a phone study, one of the most critical variables in reaching respondents is their time zone. Not only does time of day impact response rates, it can also impact your targeting and the accuracy of your data depending on your demographics and other quota groups. Weighting by time zone in your dialing process can help focus your interviewing resources on the “right” parts of the country during the shift. The United States population distribution by time zone is roughly 50 percent Eastern, 33 percent Central, 5 percent Mountain and 15 percent Pacific/Hawaii/Alaska. During prime time calling for the east coast, you might want to weight up the east and weight down the west to concentrate interviewing hours. By the time the east shuts down for the night, you would then have plenty of resources to handle the west. In another scenario, you might want to weight up the Mountain time zone so those numbers do not get overwhelmed by the Eastern or Central time zone calling.

7. Target your efforts through weighting by markets/sample variables

Similar to time zone weighting, you might want to view your sample based on markets and weight them accordingly. Markets could be DMA, states, area codes or really any sample variable that can be categorized. Weighting can help you drive your dialing on a phone methodology study to better target key groups and markets. Again, the better your demographic and quota representation through targeting, the faster you can get to analysis and the less weighting you may need.

Implementing these strategies and tactics can dramatically enhance respondent targeting. Good targeting can help you contact and interact with respondents in ways that fit their realities. More focused targeting can lead to faster results with greater confidence in the data. By optimizing how you reach and communicate with every contact, you can use your resources in more productive ways, all of which saves you time, money and ultimately contributes to the project’s success. ▽

Allen Porter is the vice president of customer success at Survox. He is responsible for overseeing all aspects of the customer support experience, including technical support, best practice knowledge transfer and professional services. Porter holds an MPA and BA from Missouri State University.

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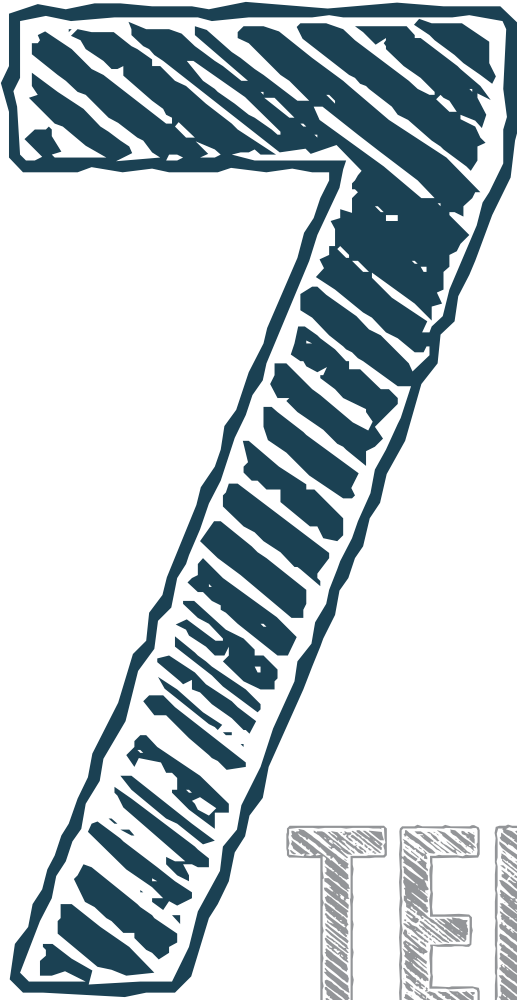
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BECAUSE BRANDS ARE SO OVERWHELMINGLY IMPORTANT TO THE SUCCESS OF A BUSINESS, ENORMOUS AMOUNTS OF RESEARCH ARE DEVOTED TO UNDERSTANDING HOW BRANDS FUNCTION WITHIN THE MIND OF THE CONSUMER AND, ULTIMATELY, INFLUENCE PURCHASING DECISIONS.

TENETS FOR UNDERSTANDING BRANDS FROM THE CONSUMER PERSPECTIVE

By Trevor Kvaran, Ph.D.

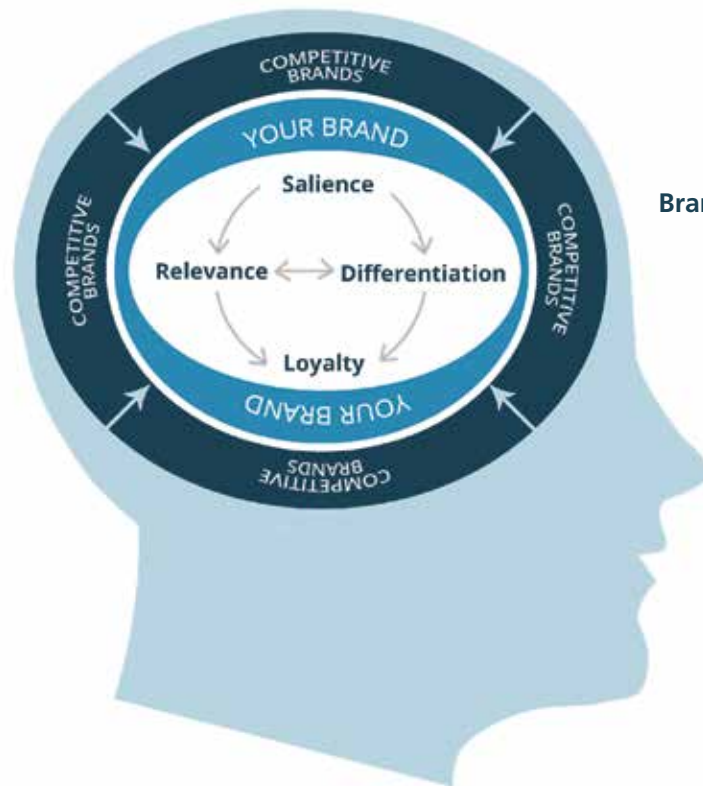
For many businesses, brands are among their most valuable assets. Brands provide consumers with reasons to choose theirs and to pay more for some brands than others. Further, they offer consumers “shortcuts” in their decision making on the basis of brand perceptions. Because brands are so overwhelmingly important to the success of a business, enormous amounts of research are devoted to understanding how they function within the mind of the consumer and, ultimately, influence purchasing decisions.

While it is well understood that brands are essential to successful marketing and business performance, marketing research aimed at understanding the consumer mindset in connection with brands has struggled to provide solid answers. This leaves many brand managers at a loss when it comes to understanding how to focus their marketing communications for the best chance of success. I suggest that one reason brand research is often so difficult is because consumers view brands in relation to their personal beliefs and experiences in a manner that is highly complex, multifaceted and fluid.

Researchers often strive to identify a single, simple model or method that can capture everything they want to know about a brand, but this single-metric/ single-method approach is misguided. It is unlikely and potentially foolhardy to think that a question as rich and complex as how a brand works to drive consumer behavior *could* be boiled down to a single metric while still managing to provide significant insight. Therefore, it is essential for brand managers and marketing researchers to embrace a holistic approach to understanding brands. Brands, as they reside within the minds of consumers, are dynamic, changing and ever-evolving with each new experience. Accordingly, researchers are encouraged to use a dynamic approach, employing longitudinal design models for optimal insights. Outlined at the top right is an approach that uses multiple models and such a design.

1. Measure What Is Relevant (Then Measure It Again)

Understanding a brand's place in the mind of the consumer starts with collecting the right data. Knowing what data to collect can be a challenging task, but understanding how brands exist and are accessed in the mind can provide a useful starting point. According to one model of branding, brand health within the mind of the consumer can be quantified across four distinct dimensions:



Brand Health Model

IT IS UNLIKELY AND POTENTIALLY FOOLHARDY TO THINK THAT A QUESTION AS RICH AND COMPLEX AS HOW A BRAND WORKS TO DRIVE CONSUMER BEHAVIOR COULD BE BOILED DOWN TO A SINGLE METRIC

Saliency: This is the initial requirement for branding within the mind. Saliency captures the extent to which a brand is in the consumer's mind at all or is included in the mental set when considering a purchase.

Differentiation: To hold a meaningful place within the mind of the consumer, a brand must occupy a distinct position relative to competing brands. Whether or not the brand is tangibly different from the competition, the consumer must perceive the brand as somehow different than others within the choice set.

Relevance: While differentiation is important, it is critical to the success of a brand that it be differentiated in a way that is *meaningful* to the consumer.

Loyalty: Conceptually, loyalty captures the extent to which a consumer feels connected to the brand in ways that encourage him or her to choose it over other brands. Loyalty encompasses more than just habitual behavior in a consumer-centered approach and also includes measures like brand affinity and connection.

Incorporating measures of saliency, differentiation, relevance and loyalty within consumer research is essential, but a second, often ignored step is just as important when considering the dynamic nature of consumer perceptions and behavior. To fully understand a brand, one must delve into how it changes over time. Changes are often subtle, particularly for well-established brands. As such, simple trend data is not sufficient. What's important is to examine how, as certain perceptions and behaviors change, these changes affect other perceptions and behaviors.

This exploration is best conducted via longitudinal design research – interviewing the same consumers at two or more points in time. Although monitoring the same consumer at multiple points in time poses methodological challenges, it is ultimately one of the most powerful tools for evaluating brands within the minds of consumers. To truly capture how and why brands change – and, more importantly, how strategically-directed change can be produced in order to obtain desired outcomes – the power of longitudinal data cannot be overstated.

2. Identify Hidden Features

One of the promises of modern analytics is that it allows researchers to see hidden patterns or features that are not apparent with a surface level inspection. To realize the potential of brand data, researchers need to look beyond the surface metrics commonly collected and reported and look also toward multivariate methodologies, such as principle component analysis, factor analysis and latent variable modeling

techniques. These multivariate approaches can provide powerful insights into the true structure of how a brand is perceived among consumers and can help researchers, analysts and key decision-makers move from an overwhelming quantity of data down to a set of key underlying factors that are robust across time. In the example below factor analysis was applied to a consumer packaged goods brand's perceptual data to identify four key underlying factors. This targeted data helped the brand team understand how consumers think about their brand as well as others within the consideration set.

3. Identify Differentiation Points for Brands

Identifying critical points of differentiation from competitors is a key component of a robust brand model. Although

Factor Analytic Structure of Attribute Set



Four Quadrant Brand Landscape Map



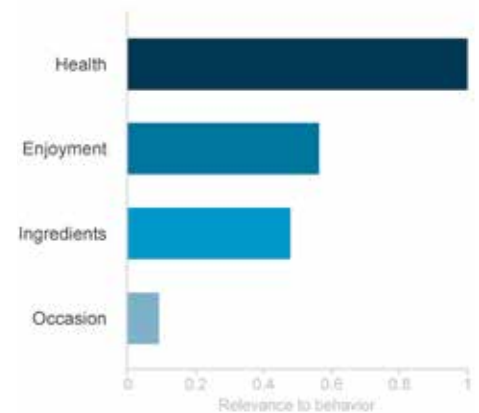
there are various methods, one valuable approach to evaluate differentiation is to use correspondence analysis to place brands and perceptions onto a shared two-dimensional space to create a "brand landscape" map. In the second example pictured at left, two principal axes show the landscape in which four frozen food competitors are working. The X-axis identifies brands with a focus on back-to-basics natural food versus product innovations. The Y-axis contrasts brands focused on good taste versus health-related dimensions. With this visual analysis, it becomes easy to see which areas a particular brand "owns" and which areas are potentially underserved. In the visual, we can see that Brand A has a strong dominance in the "natural" space but that it's not particularly differentiated on the taste/health dimension. In contrast, Brand B is highly differentiated from its competitors on the "taste" dimension but not on the natural/product dimension. Statistical tools can also be applied to these maps to identify "undifferentiated zones" within the map. Undifferentiated zones are areas within which a brand should have concern that it is *not* differentiated; it is a sign that the brand does not strongly stand for anything within the mind of the consumer. In the example, we can see that Brand C falls within the undifferentiated zone. Tracking movement over time within a brand landscape using longitudinal data can also provide useful insights into the stability of a brand's positioning within the consumer mindset.

4. Evaluate Relevance by Analyzing Key Brand Drivers

While multivariate methods are powerful for finding hidden meaning in data and identifying differentiation points within a competitive set, identifying those elements that are most relevant to the consumer is best handled with modern predictive analytic techniques. Using predictive analytics to identify the key perceptual drivers of demand is a particularly powerful route to understanding the brand's consumer relevance, providing great value to the brand's stakeholders. Well-tuned regression models can be particularly powerful for understanding which perceptual features are key drivers of demand for a product. Understanding this relationship provides deep insight into the relevance of a brand to consumers.

Integrating across the approaches that have been discussed, it is often useful to build factors derived from a factor analysis (as described above) into a relevance analysis. This can provide a wide-screen view of which major factors are drivers of demand...as opposed to getting

bogged down in the minutia of individual perceptual attributes. This data is often easier to interpret and more consumable by a broader range of brand stakeholders. In this example, we have taken the four factors identified earlier and used predictive modeling to identify their relationship to a set of behavioral measures. For this brand, the analysis identifies that health messaging is most relevant to purchasing decisions within the mind of the consumer. In contrast, specific messaging around usage occasions is relatively unimportant.



Reviewing a brand's relevance within the context of its primary competitors can be useful because perceptions of competitors are often as relevant to purchasing behavior as perceptions of a brand itself. In the next example, predictive analytics have been applied in order to identify the relevance of both a brand's perceptual measures and perceptions of its competitors. The diagram on the next page highlights areas where the brand owns a clearly distinguished and relevant perceptual idea ("Is a meal I feel good about") as well as those ideas that are relevant but that are not owned exclusively by the brand ("makes healthy eating enjoyable").

5. Harness the Power of Longitudinal Data

While significant understanding of a brand can be achieved with traditional tracking methodologies that do not track the same individuals over time, deeper insights can be achieved by monitoring the same set of individuals longitudinally over an extended period of time. This longitudinal assessment of the same sample, on the same measures, is the best way to understand how the dynamics of a brand have changed over time.

In particular, longitudinal data provides superior insights into brand churn and brand loyalty. Loyal customers are a brand's holy grail. Longitudinal data provides brands with a wealth of insights and tools such as how loyal their consumers are and, conversely, the churn or volatility around a

Brand Relevance Derived from Attribute Set



brand. With longitudinal data, churn can be quantified as the percentage of people who move in or out of a particular measure of demand, such as “brand used most often” or “past week usage.” Brands with differing amounts of churn or loyalty will need to adopt different brand strategies and tactics. For example, brands with a highly loyal customer base should focus on deepening relationships with their consumers while brands with extensive churn may choose to focus on generating large amounts of trial to replace a fickle user base.

6. Don't Ignore Word of Mouth

Particularly critical, and often ignored, are Word of Mouth (WoM) effects. The rise of online review sites and social media have extended the range of WoM influence and altered the role that it plays in consumer purchasing decisions. Given the increased importance of WoM for sales, businesses must evaluate their effectiveness at generating and capitalizing on all kinds of WoM. Businesses must ask questions and gather data like:

- What sorts of conversations are people having about our brand and products?
- When people talk to experts or store employees, do they come away with improved perceptions of our brand?
- When people share information about our brand, does it tend to be positive or negative, emotionally charged or indifferent?

Answering these questions can be a useful starting place, but to truly see the value in WoM research, a business must

BRANDS WITH A HIGHLY LOYAL CUSTOMER BASE SHOULD FOCUS ON DEEPENING RELATIONSHIPS WITH THEIR CONSUMERS WHILE BRANDS WITH EXTENSIVE CHURN MAY CHOOSE TO FOCUS ON GENERATING LARGE AMOUNTS OF TRIAL TO REPLACE A FICKLE USER BASE

put it into the context of its advertising, consumer perceptions, competition and sales. A brand can then dramatically expand the points at which it strategically influences sales via advertising.

Additionally, WoM can provide insights into the emotional life of a brand in a special way. Sentiment analysis of WoM experiences can show the *emotional* connection consumers have to a brand. This analysis includes insights with relevant context such as communications with close friends and family, social media and sales associates. Identifying the emotional context in which a brand is discussed can be a powerful clue to whether a brand is healthy or headed in a problematic direction.

7. Bring Divergent Data Streams Together

While the methods described above can be carried out within research based upon stated attitudes and behavior from a well-designed survey, value and insight can be added by blending the model results from consumer research with other behavioral data. For example, using text analytics to conduct sentiment analysis on social media chatter can be a useful supplement to more traditional perceptual and WoM measures captured in survey research.

Integrating consumer research with sales data can connect insights about how consumers view a brand with broader business objectives, either by conducting consumer research among individuals for whom true purchasing data can be collected or by finding strategies to link consumer brand data to broader sales patterns. Marrying qualitative data streams with quantitative research is another challenging task that brings with it an opportunity for improved insight. While it is important that each individual data stream stands on its own right, a brand can maximize the effectiveness of its research by devoting significant thought to how these oftentimes divergent streams can be brought into harmony with each other.

Bringing It All Together

Clearly, understanding how brands reside in the mind of the consumer is a significant challenge. Consumers often can't articulate what they believe to be true about brands and why they choose one brand over another. Therefore, the research and analysis necessary to understand where a brand sits vis-à-vis other brands that occupy space in the mind is rarely a simple task. Indeed, the mind of the consumer can only truly be understood by using a multiplicity of modern analytic techniques and then comparing and contrasting. If brand research is carried out with this perspective, as opposed to searching for a single number or measure, a deeper, richer understanding of the brand and consumer relations will be discovered. ▼

Trevor Kvaran, Ph.D., director of information services, Communicus, oversees a team responsible for developing strategic processes to accumulate, manage and analyze information as well as maintain the integrity of client data. He specializes in using a wide variety of quantitative methods and statistical computing solutions to better understand consumer behaviors and has an extensive background in researching different aspects of decision-making, predictive modeling and data visualization.

ORCHESTRATING SOLUTIONS TO YOUR BIGGEST RESEARCH CHALLENGES — FAST

By Sandy McCray

SOLOS REMIND ME OF WHAT OFTEN HAPPENS IN FOCUS GROUPS. AN OUTSPOKEN LEADER EMERGES AND OTHER PARTICIPANTS SIMPLY ECHO HIS OR HER SENTIMENTS FROM A SUPPORTING ROLE.



With the pace of our world being faster than ever, we often do familiar things without thinking very much just to finish as quickly as possible. That should give you pause – don't you think that's how a lot of people are responding to your research studies?

When I'm faced with challenges and need to really focus, I turn to music. It inspires me, invigorates me and provides the rhythm that keeps me moving forward. In thinking more specifically about it, I've found that there's a lot to be learned about research from music. Let's take a look.

You need a composer. Your research challenges need someone to write and organize the score. They need to have the knowledge of – and the art for – combining different parts that, together, will create beautiful music.

You'll probably have other accompaniments that will influence your new research score; make sure your composer knows about them. They might include your internal practice band that will likely want to try the score before you bring in new musicians, or existing "beats" like syndicated research or ongoing studies that will play in the background.

From your input, the composer will provide the notations and symbols that direct your participants (the musicians) to deliver a harmonic result.

But, you'll have additional considerations before even a practice performance can occur.

Determine how many soloists you want. Solos can be beautiful and moving but don't represent the full harmony possible from a group. The other musicians are relatively hidden, softly providing background support for one strong melody.

Solos remind me of what often happens in focus groups. An outspoken leader emerges and other participants simply echo his or her sentiments from a supporting role. The others stop listening quite as carefully and the pressure is removed from the less outgoing participants who no longer need to worry about leading parts of the conversation. You may come away with answers but how confident are you in those answers if they've been greatly influenced by one strong voice?

Think about just how many soloists you really want and how they will influence the results of your qualitative research.

Establish your preferred tempo. Timelines are always a consideration in how you'll approach the research challenge, so they'll set your preferred tempo. If you have time, your tempo may be "adagio," working more slowly, at a relaxed pace. However, if you're crunched for time (and who isn't these days?), your tempo is more than likely

"allegro," working fast, in a lively manner.

With several details sharply in place, it's time for the most important decision – the selection of the musicians that will ultimately perform your score.

Identify the right group for you.

You need the right musical group for your score and you've certainly got options. Do you want violins only, or is a full symphony orchestra a better bet?

WITH THESE SURVEYS, PARTICIPANTS OFTEN DISTRACTEDLY CHECK BOXES IN RESPONSE TO WHAT THEY SEE AS A BORING, AND SOMETIMES POINTLESS, BATTERY OF QUESTIONS

If you think about this question in research terms, the "violins only" option is like using a target audience. Each participant is similar, perhaps in demographics or buying behavior, and bring a similar viewpoint to your challenge.

With a target audience, you'd probably link them to a quantitative survey online, the type of surveys they respond to all the time. With these surveys, participants often distractedly check boxes in response to what they see as a boring, and sometimes pointless, battery of questions. Mostly, they're just glad when they are done so they can confirm their reward and move to their next "to-do."

In your typical targeted quantitative survey, your general inclination is probably to ask participants what they would buy or what they prefer. In doing so, though, you will often experience inflated self-perception which leads to that dreaded over-stated purchase intent. Aren't you trying to figure out how to eliminate that and to also more fully engage participants?

Perhaps you should try a symphony orchestra. In an orchestra, each musician has diversity of training and brings a unique talent to the group, but they all work together with their individual instrumental voices to collectively create beautiful music.

In research terms, your musicians are "crowds." Crowds are often general population participants who self-select into your research based on perspective. They have diversity of opinion and each participant has their own sphere of influence. These are your musicians. And just like orchestra members create a

collective melody to entertain the audience, these diverse research participants create the "collective wisdom" that will solve your business problem or challenge.

To use the crowd effectively, you'll want to shift how you approach research design – because, just like musicians, crowds like to "play," and that means removing the tedium of a regular survey.

Encouraging your musicians to play.

People will participate in things that are entertaining. They love a problem or puzzle that takes some thought and consideration or a challenge that they can potentially win. These are actually the elements of "gameful design."

By definition, gameful design makes non-game tasks more fun, more engaging and more motivating. And it's already being successfully integrated into marketing research. To use it in creation of your own research score, think for a moment about the games you love to play and why. Here are some guidelines for building your own gameful approach:

First, take a fresh look at what you're trying to accomplish and perhaps put on your creative – rather than your traditional research – thinking cap. Think about how you can reframe your research goals into a problem that can be solved or a challenge that can be won.

Second, think differently about your participants. Think of them as the varied musicians we've already discussed, musicians who have diversity in their spheres of influence that include friends, family, colleagues and acquaintances, all of whom may be members of your target audience. These musicians, your participants, often know members of your target audience and how they think on a more objective level than the members know themselves.

Third, make your participants feel like a member of a special community, your orchestra, rather than focusing on them as individuals. Let them know they are creating your collective melody, your collective wisdom. You're asking them to think about a particular type of person, one from their sphere of influence, and they're playing a part in orchestrating the prediction of what that person would do or prefer. It's critical to note that we've found these types of social predictions to be much more accurate than someone's own self-reported intent.

Fourth, give them a reason to keep playing beyond a typical survey incentive that everyone gets so they'll truly stay engaged. Dangle a carrot of something special if their responses help to solve your research challenge. It should be your answer to "What's in it for me?" Orchestras play for

applause and accolades. People play games to “win,” so your participants need the opportunity to feel that satisfaction or sense of accomplishment.

Fifth, make sure they have fun. It’s one of the main reasons people play instruments and games, too. If your research feels more like play, your participants will contemplate their “moves” and they’ll stay more engaged.

It’s not a dress rehearsal. If you’ve not used it or heard of it, let me give you some examples of gameful design in action:

In the FourSquare app,¹ users have incentives in the form of badges they can earn when they visit new and unique places. The information about where users visit informs the research behind the scenes that helps to develop customized content for others in specific geographic areas.

Crowdtap² provides consumers a platform where they can interactively play and be creative while informing brands at the same time. For example, participants can compete against others to host the best brand-sponsored event.

Intengo³ has innovation solutions with gameful design, all using the collective wisdom of crowds. Its prediction market platform asks participants to play an investment game with virtual dollars, investing in concepts that they believe will be most appealing to the target audience. If they predict the winning concept, they receive a “dividend” of real money.

SuperBetter⁴ is an app (and game) that builds real-life resilience. More than half a million players so far have used it to tackle challenges like depression, anxiety, chronic pain and more. This platform was created by Jane McMonigal, a world-renowned alternative reality game designer and inspiring presenter at TED Talks.

One last critical element for your orchestra: find the right conductor. While all of this may seem simple on the surface, it’s just like good music – it takes a lot of practice. The right conductor ensures that individual musicians are in tune, that they can see the baton, and that they understand the nuances of the musical score and how their part fits into the collective melody. And they make sure the tempo is right. Be sure to find a conductor who will lead the crowd to

the best solution for your research challenge, meeting your tempo needs.

Just like musical groups, crowdsourced solutions come in all shapes and sizes. Some were born out of technology and a rarer few grew out of traditional research. The latter will offer you more seasoned conductors, people who have learned through years of experience how to get the crowd to harmoniously and collectively solve your research challenge. Go ahead, have some tryouts before you make your selection.

The finale. Hopefully, thinking of your research in musical terms has helped you think outside of your box. By asking “musicians” to play a beautiful, collective melody for an audience rather than just themselves, you have the opportunity for more engaged and spirited participants who provide deeper, more thoughtful responses.

So, for your next research challenge, why not find a seasoned crowdsourcing conductor to lead the orchestrated crowd in identifying your optimal solution? The results will be music to your ears and you may even find yourself taking a bow! ▼

Sandy McCray is the insights curator at Intengo, where innovation solutions are rooted in the collective wisdom of crowds. Reach Sandy at sandy@gointengo.com. Visit Intengo at www.gointengo.com.

1 foursquare.com

2 crowdtap.com

3 gointengo.com

4 www.superbetter.com



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**DIAGNOSING THE
AUTOMOTIVE PATH
TO PURCHASE**

By Alice Morgan

This is the story of how classic and cutting-edge qualitative research methods were used to diagnose the automotive path to purchase and to enhance the dealership experience.

What We Did

In the Summer of 2014, Doyle Research and DrivingSales, an automotive dealership consulting and training company, conducted a comprehensive research program to:

- Understand actions at the dealership that influence consumer perceptions.
- Define key experiences that lead to engagement or kill the opportunity.
- Identify what car shoppers want in a retail experience.

Method(s) to the Madness

Buying a car is a big deal. It is a complex, lengthy and emotional process. There are many phases. It's a lot of money. To understand the totality of this experience, we employed a mixed-method qualitative research design which included both classic and cutting-edge methods. This allowed us to understand the complexity of the process and to diagnose the path to purchase.

Here are the qualitative methods which were used, and to what end:

Webcam Interviews (Cutting-Edge Method)

When people buy a car, where do they begin? Online. So we conducted six webcam interviews with participants who were in the research phase of car-buying. They shared their screen and we were able to see exactly what they were doing online. Through this method, we saw what kind of sites they accessed, in what order, and the reasons for their behavior.

Geo-Storiessm (Cutting-Edge Method)

As seasoned researchers know, there are two ways to conduct qualitative interviews. The first is via a pre-recruit. An example of this method is a shoppalong, in which we recruit participants who plan to buy an item within a specified time interval. We then meet them at a specified retailer and watch them shop for the item. Although this method has many advantages (and, in fact, we used it ourselves in this research), these retail excursions are semi-staged. They are not authentic. The second way to conduct qualitative interviews is via an intercept, in which we ask shoppers whether they have a moment to talk with us. The problem here is that in many cases people refuse to participate because they (understandably) dislike being interrupted.

To overcome these hurdles, we invented Geo-StoriesSM, real-time, geo-validated qualitative interviews conducted at the

moment of product experience – the research equivalent of lightning in a bottle. This method enabled us to intercept auto shoppers who had gone to the dealership that day on their own accord and who agreed to talk to us then and there.

In-Home Ethnographies (Classic Method)

We conducted 18 ninety-minute in-home ethnographies with automotive shoppers who were either close to purchasing a car or immediately post-purchase. The three markets were San Diego, Minneapolis and suburban New York City. In-homes enabled participants to relax, get comfortable and delve into all the nuances, emotions and complexities of the process and purchase. Several women provided tremendous depth about how and why they were intimidated by the process. We heard loud and clear that some car shoppers want to avoid car salespeople as much as possible. Several questioned what value the dealership offers and wanted to buy online. All of these interviews were videotaped, which allowed us to create compelling consumer testimonials later used for dealership training.

Geo-Stories are real-time, geo-validated interviews conducted at the moment of product experience – the research equivalent of lightning in a bottle

How It Works

Through precision geolocation-tagging, participants in a mobile panel received a text message when they were at a car dealership. After a short mobile survey determined that they were there shopping for a new car (as opposed to getting their car serviced or buying a used vehicle), we interviewed them by phone. We also asked them to take a selfie and to snap a few pictures of the dealership they were visiting. Through this method, we were able to obtain authentic, in-the-moment insights about the process of buying a car – why they were there, what they thought and what they liked and didn't like. A follow-up online bulletin board group was conducted a few days later to obtain additional feedback.

Dealership Drive-alongs (Classic Method)

For six of the in-home ethnographies, once a rapport had been established with the participant, we accompanied them to the dealership and tagged along as they shopped for a car. After the shop-along (or drive-along, really) we asked what they liked, what they didn't like and how the experience could be improved. During one in the New York area (which lasted three hours), Tony, shown below, actually bought a car!



Quantitative Research Follow-Up

Following the qualitative research, a quantitative research firm conducted an online survey with 1,300 new vehicle purchasers by. Principal components analyses (PCA) were run to determine what was important in considering dealerships during the pre-shopping, active shopping and post-purchase phases. This analysis provided dealers with specific, actionable guidance on how to approach different types of buyers.

The Findings

Many new vehicle shoppers find the car-purchasing experience stressful and unpleasant. Over half indicated that they would buy new cars more frequently if it weren't such a difficult and intimidating process. We discovered three main roadblocks:

- Great expectations
- Communications breakdown
- A serious lack of trust

The Zappification of Retail

Most of the people we talked to believe that dealerships have gotten *slightly* better over the years. The problem is, other verticals have gotten *substantially* better. Other categories (think Zappos) provide unfiltered reviews, pricing transparency and a low-pressure retail environment. Car dealerships don't. A number of participants questioned why they had to go to a dealership. Why couldn't they just buy a car online? This is the new normal. Car shoppers want what other retail categories

provide – convenience, fairness, control and autonomy.

Communications Breakdown

The average number of customer visits to dealership before buying a car has plummeted. Ten years ago, Americans visited five dealers before making a purchase, according to McKinsey. Today the average number of visits is 1.6. And we found that in 61 percent of cases, shoppers' first interaction with a dealership is walking on the lot. People go online, avoiding the dealerships until the last possible moment. Then they visit, and because they haven't engaged beforehand, often have a poor experience. Here's why.

Poor Dealership Websites

They're cluttered, confusing, hard to navigate and shoppers don't trust the information provided. Over half of new car shoppers don't visit dealership websites at all. Shoppers rely on third party sites instead like cars.com and autotrader.com.

Outdated Communication Practices

People no longer want to talk to their nearest and dearest, let alone to a car salesperson. Dealership contact forms that require phone numbers and sales strategies that emphasize personal contact backfire, particularly among Millennials. The auto manufacturers don't help, continuing to require that salespeople hit monthly quotas for phone contacts. What would help? Allowing indirect forms of communication such as email and texting.

Too Little, Too Late

The result of these barriers is that car shoppers avoid interacting with the dealership until very late in the process. And when they do visit, they often have a poor experience with a salesperson they just met

Serious Lack of Trust

The biggest problem we found is that lack of transparency has poisoned the process. Many shoppers fear being taken advantage of. It doesn't help that car salespeople don't ask about their needs, dealerships fail to post prices and lengthy back-and-forth negotiations often ensue. Too often, the relationship is seen as antagonistic and fraught.

The result of these barriers is that car shoppers avoid interacting with the dealership until very late in the process. And when they do visit, they often have a poor experience with a salesperson they just met.

Time for a Paradigm Shift

Over half of car shoppers said they would buy a vehicle more often if the process was not so difficult. Car dealerships need to rethink engagement, provide greater transparency and forge connections with new car shoppers earlier in the process. For example, see the table at the bottom of the page.

The Times, They are A-Changin'

A handful of dealerships are embarking upon a new way of doing business. Sonic Automotive has launched a program in which shoppers get a new car in 90 minutes with no haggling. Subaru of Wichita has non-commissioned salespeople and "no gimmicks" pricing. And Autonation is launching a completely online sales channel that is expected to go live by the end of this year.

Qualapalooza

So let's return to our objectives. This research is being used to design training programs for car dealerships. Will car salespeople be motivated by a bar chart or a customer satisfaction number? We think not. Car salespeople will, however, be motivated by authentic footage of real car buyers talking about their concerns. We hope this article will encourage readers to believe in the power of qualitative research. Long the "ugly stepchild" of quant, particularly in this era of Big Data, qualitative can generate tremendous insights about complex, emotional topics such as the automotive path to purchase. ▼

Alice Morgan is a senior qualitative strategist at Doyle Research Associates and started her market research career in high school working after school at Survey Sampling (she was SSI's fourth employee). She has also worked as a customer satisfaction consultant and for a full-service marketing research firm. Once Morgan discovered moderating, however, she was hooked and eventually found her way to Doyle Research Associates where she has lived (professionally) happily ever after.

Car Buyers	What To Do
Visit the lot when it's closed to avoid car salespeople.	Provide a self-guided sales channel for car buyers early in the process in which they can tour car dealerships without a salesperson, perhaps with the assistance of a tablet or smartphone.
Don't trust the salespeople they just met at the dealership.	Provide car shoppers with an easy way to connect with a salesperson prior to coming in. Prominently list salesperson bios and email addresses on the website.
Don't want to talk to a salesperson.	Stop requiring phone numbers on dealership websites and allow shoppers to communicate indirectly with dealerships.



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SHOULD DATA VISUALIZATIONS MATTER TO MARKET RESEARCHERS?

By Keith Phillips



There has been a lot of interest around the subject of data visualization by the marketing research industry, and why shouldn't there be? We know from our co-workers in the marketing department that visualizations help people to retain more information. We see from publications that images are being used not just to complement the story, but to actually tell the story on their own.

What does the adoption of data visualization mean for us as marketing researchers? If our deliverables do not have interesting images, does that mean our research results will not be properly digested and utilized? To answer these questions, I devised a piece of research that would ask B2B panelists to evaluate different deliverables.

The deliverable that I chose was a "topline" or executive summary. This was practical for testing as it was only one page in length with a limited number of data points. Results would also be most relevant to marketing researchers as this is a typical deliverable that, depending on who designs it, may or may not have some visual component.

The research question was straightforward. Should we as researchers include data visualization in our topline deliverables? And if the answer to that is "it depends," then the question becomes, what does it depend on?

Who did we talk to?

We interviewed 1,813 business people. Forty-three percent were owners/partners in a business, 37 percent were middle management (directors/department heads), and 19 percent were senior management (CEO/VP/managing director).

What was tested?

Three deliverables were created. The first was a basic topline that contained a bullet point summary but no visuals. The second was an infographic. For the infographic deliverable, I gave the data to our graphic designer, who did a wonderful job giving the data a very visually appealing format. Finally, I added a third deliverable that included simple charts as the visual component.

The bullet point summary and the infographic both contained the same information and the exact same number of data points. The chart summary did include four extra data points, but this was only to complete a bar chart. For the most part, all three deliverables had the same information.

How was the test conducted?

In order to test these deliverable types, I asked members of our B2B panel to take part in a role-playing exercise. I wanted to use information that everyone would be able to relate to on some level and, for that reason, I chose human resources (HR) as the topic. I asked our B2B participants to pretend that they were an HR manager for a large firm. They have asked one of their HR employees to conduct an employee satisfaction survey and to create a topline summary that will be sent to the company's CEO. As the manager in charge of this project, it was our survey participants' responsibility to review their employees' topline and provide feedback prior to giving it to the CEO.

IMAGES ARE BEING USED NOT JUST TO COMPLEMENT THE STORY, BUT TO ACTUALLY TELL THE STORY ON THEIR OWN

Each survey participant was initially shown only one image and asked to evaluate it. Later in the survey, they were told that another employee also created a topline from the same data and were asked to evaluate this topline as well. The images were rotated. Finally, they were asked to choose between the two topline they had seen. This created six unique pathways through the survey (three images with each participant only receiving two which were rotated for each survey).

Our participants were then given a list of primary goals that needed to be met in the research.

- *The primary goals of the research are to answer these key questions:*
- *How satisfied are employees with working for the company?*
- *How satisfied are employees with their retirement plan?*
- *What do they like best about working at the company?*
- *Do employees feel they have enough training to do their job effectively?*
- *Do employees feel they receive enough recognition for the work that they do?*
- *Do employees feel they have a clear path to a promotion?*

Did the data visualizations make a difference in the initial evaluation?

When we asked our survey participants if the primary goals of the research were accomplished based on the deliverable they saw, we found a similar level of agreement across all deliverable types. (chart, next page)

However, when we asked participants to rate the deliverable (the key measure that was actually asked first), the rating was somewhat higher among those who saw the infographic. (Chart, next page.)

It is worth pointing out that the ratings in general were lower than the proportion of the sample who agreed that the primary goals of the research were met. This is an indication that our B2B participants expect more than just receiving the primary goals when asking for a deliverable.

Additionally, we asked people to rate the layout of the deliverable. As might be expected, rating of the bullet point summary was lower (19 percent "excellent" for the bullet summary versus 27 percent for the infographic and 24 percent for the chart summary).

Feedback on the deliverables.

Participants were given a list of adjectives and asked to select the ones they would use to describe the deliverables. The infographic was most likely to be described as "interesting" (42 percent) and "artistic" (24 percent), but it was least likely to be viewed as "simplistic" (29 percent). Upon examining the open-ended responses, simplicity is seen as a plus for this deliverable. Some participants disliked the "busy-ness" of the infographic as it delayed them in finding the information they desired.

The chart summary was seen as the "easiest to read" (60 percent versus 50 percent for the infographic, which was lowest).

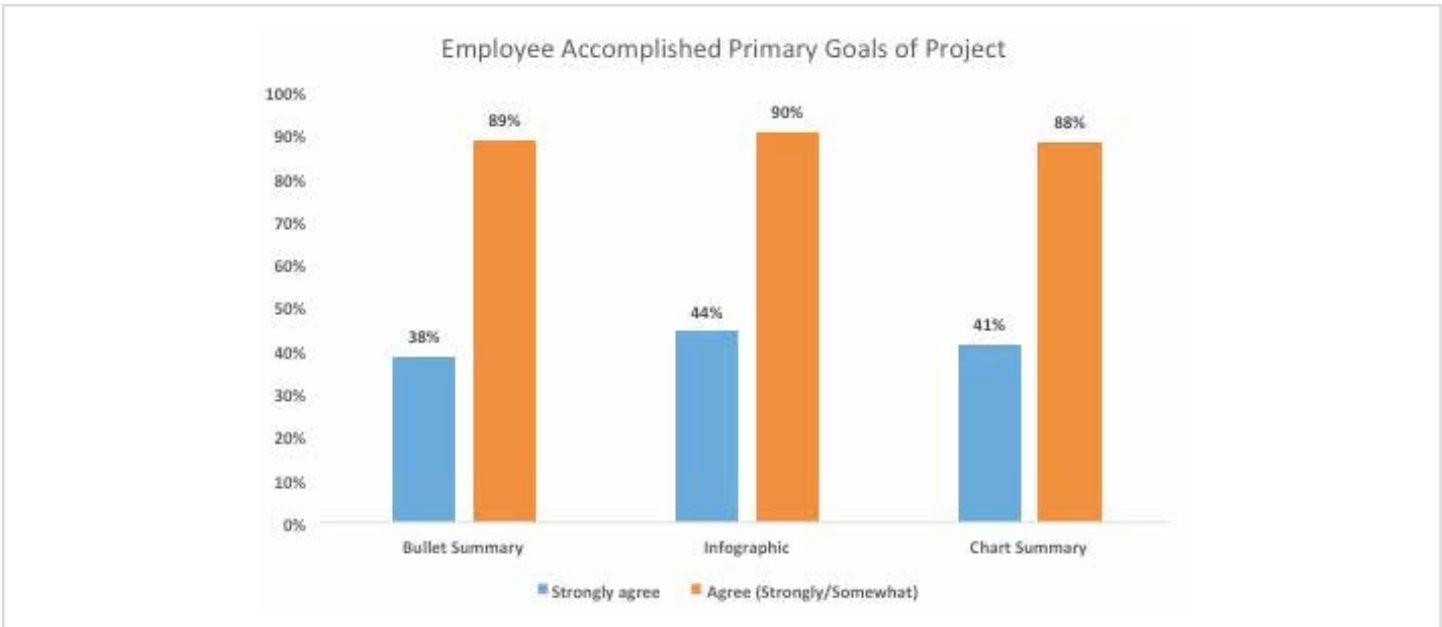
All three topline deliverables were seen as "to the point" (49–53 percent).

Participants were asked what they would do to make the deliverable better in an open-ended question.

Thirty-one percent of respondents who received the infographic told us that it "looked good and needed no changes" compared to 27 percent who received the chart summary and 25 percent who received the bullet point summary. Thirteen percent of participants who received the bullet point summary specifically mentioned "adding more/better visuals" compared to only 7 percent for the infographic summary and 9 percent for the chart.

Forced-Choice Test.

After receiving a second image, participants were asked to choose which deliverable they preferred among the two.



Bullet Summary	Bullet Summary	Infographic
31%	21%	52%
vs.	vs.	vs.
69%	79%	48%
Infographic	Chart Summary	Chart Summary

The table above shows that the Infographic was chosen over the bullet point summary and that the chart summary was chosen over the bullet point summary, but that panelists were equally divided between the infographic and chart summary.

Were there differences by management style?

Fifty-nine percent of our sample told us that they were the type of managers who “give their employees freedom to execute their tasks as they see fit.” These managers

were more likely to select the infographic (55 percent) as a deliverable over the chart summary (45 percent).

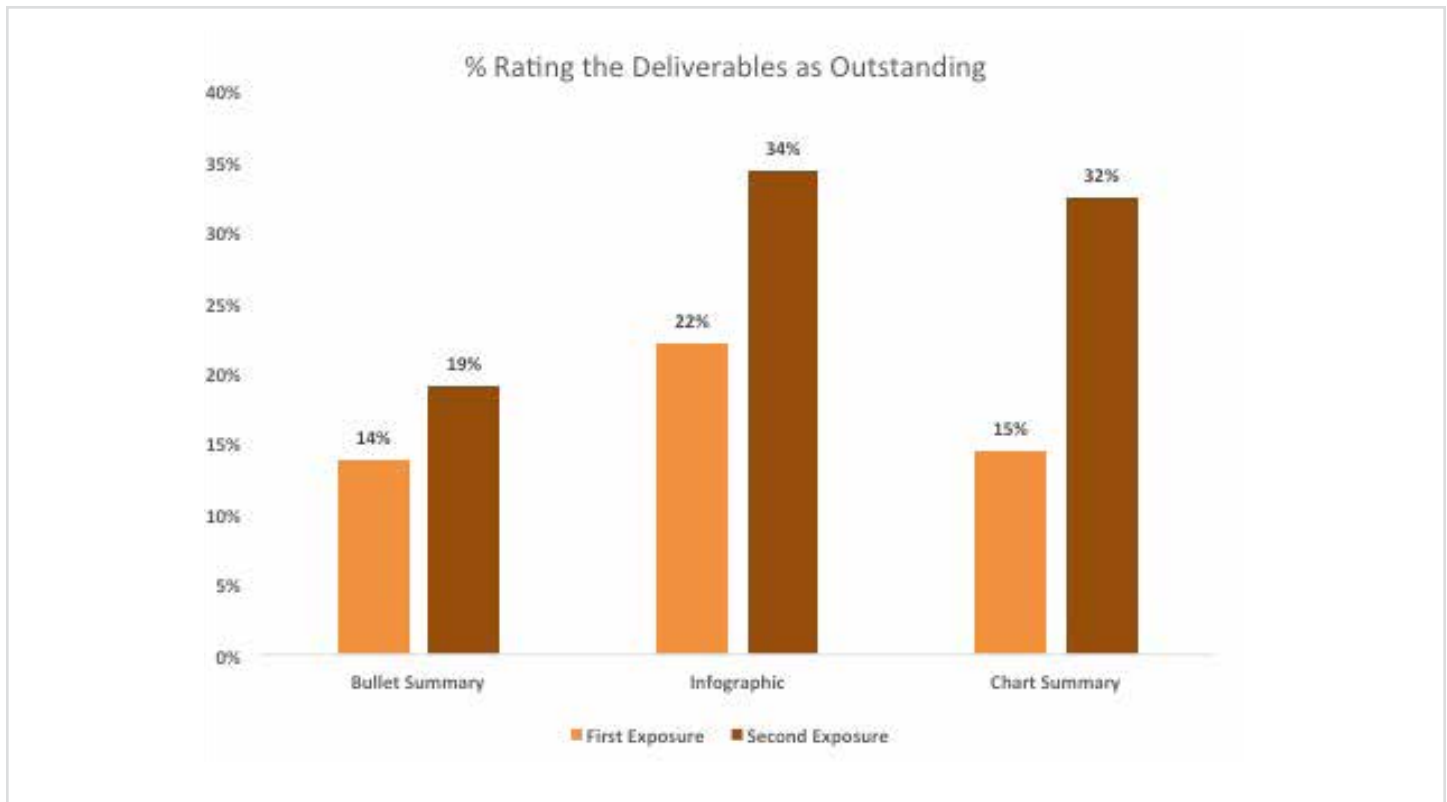
However, Senior Management preferred the chart summary (55 percent) over the infographic (45 percent).

So which deliverable format should we use for our toplines?

If this was a concept test for the general consumer, it would be clear that both the infographic and chart summary should be used over the bullet point summary.

However, 20 percent or more of the sample selected the bullet point summary when given the choice. The important thing to remember concerns who the topline summary is being created for. After all, we may just be preparing it for one person. What is their personal preference?

In fact, this study shows us that a deliverable that meets the needs of all employers/clients is probably not possible. The open-ended feedback we received was contradictory. For example, some participants liked toplines that were simple



and to the point while others expect more detail than what they had asked for. Some wanted more visuals and a written summary while others liked just the facts without visual clutter.

This study reminds us that different clients will have different preferences, too, and that not all of our deliverables should be the same for each client.

The plot thickens...

One of the most interesting aspects of this piece of research came when I reviewed the choice data by pathway, which takes into account which deliverable was shown first.

When looking at the data this way, you can clearly see that, when the same image was shown in the second position, it had a clear advantage. So for instance, when the bullet summary was shown first, 11 percent chose it over the chart summary. But when the bullet summary was shown second, 31 percent chose it over the chart summary. Similarly, when the infographic was shown first, 38 percent chose it over the chart summary. But when the infographic was shown second, 66 percent chose it over the chart summary.

This is a clear difference, larger than other biases I have noticed in the past where the item first exposed had a small advantage (an advantage overcome through rotating).

After further examination of the open-ended responses, we were able to determine that the act of evaluating the

first deliverable was leading to a higher score for the second deliverable. If the second deliverable the participant was shown improved upon a criticism of the first deliverable, then the participant would rate the second deliverable higher.

For example, when evaluating the bullet point summary, one participant recommended that we “use specific percentages instead of half and quarter.” When asked why they chose the chart summary in the forced choice exercise later in the survey over the bullet point summary, they mentioned that “it uses exact percentages. The graphics make it easier to visualize the percentages.”

One participant who evaluated the infographic told us that it was “too brief, does not give enough information for review.” Later, when asked why they chose the bullet point summary, they said, “more detailed information so more usable, plus differences between managers and non-managers.” However, both deliverables had the exact same number of data points and both deliverables had the manager breakdown by segment.

This pattern continued for many panelists. They evaluated the first deliverable and then, when they saw a change in the second deliverable that met their need, they were more likely to rate that deliverable higher. In the chart below, you can see this manifest itself in the overall ratings from when the deliverable was shown in the first position versus when it was shown in the second.

Many of you may be thinking that I asked the survey participants to take part in a role-playing exercise which forced them to evaluate the deliverable, which then created this scenario. However, I would argue that this is the exact scenario many managers face: receiving a deliverable and then evaluating it. This suggests that having a discussion with your clients about improving their deliverable and then changing their deliverable to meet those suggestions will result in a deliverable that is perceived to be better, even if the net sum is not necessarily better.

So what have we learned?

- Managers want more than just the primary goals met.
- Although graphics do add value to topline deliverables, an infographic may not be necessary. Additionally, executives prefer tolines to be simple and will choose a chart summary over the infographics.
- Everyone has different preferences, so learn what your client’s or boss’s are.
- Changes to deliverables will more than likely be well received provided they meet a client pain/observation. ▼

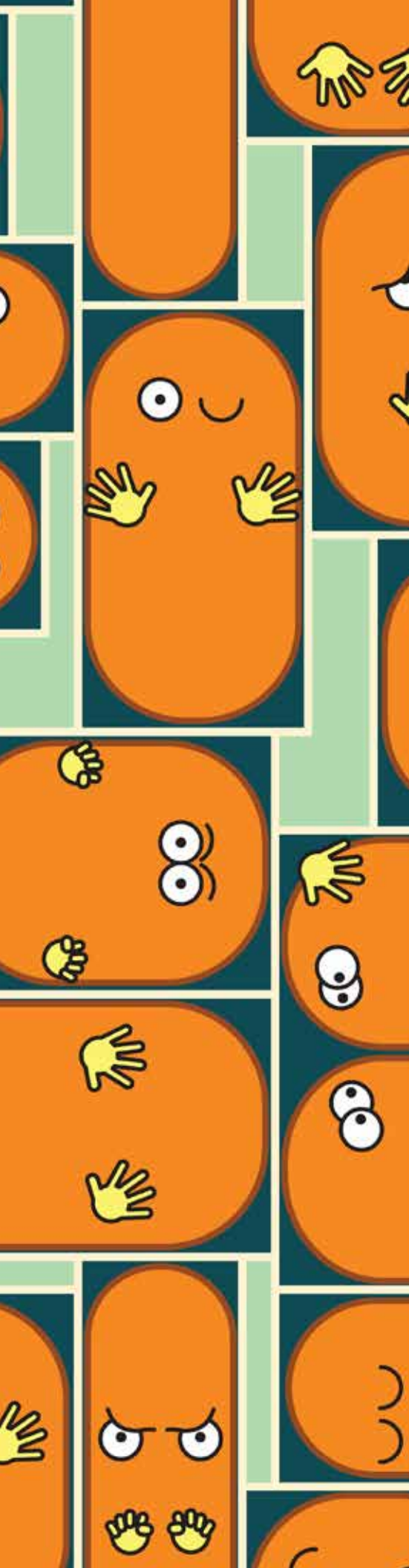
Keith Phillips is the senior methodologist in SSI’s knowledge department. His role at SSI includes conducting primary research projects, helping clients with the research issues they face on a day to day basis, training colleagues and working to support company-wide sampling initiatives. Prior to SSI, Phillips was a senior research manager in the motion picture division of OTX Research.

The background of the entire page is a collage of various orange and green rounded rectangular shapes. Inside these shapes are simple, stylized icons of eyes and hands. Some shapes contain multiple eyes, some contain multiple hands, and some contain both. The icons are drawn in a simple, cartoonish style with black outlines and flat colors (yellow for hands, white for eyes).

CREATURES OF HABIT

Part One – Changing Sticky Habits and Making the Subconscious Conscious

A Warc exclusive by Crawford Hollingworth



NEW HABITS DEVELOP WHICH MAKE OUR LIVES MUCH SMOOTHER AND MORE FLUID... AND THESE NEW HABITS ACTUALLY FREE UP OUR MINDS SO THAT WE CAN DO OTHER THINGS IN PARALLEL

“Habits form the bedrock of everyday life. Without habits, people would be doomed to plan, consciously guide, and monitor every action, from making that first cup of coffee in the morning to sequencing the finger movements in a Chopin piano concerto.”¹

The power of habit

Much of our lives are governed not by our conscious decisions or thoughts, but by our habits, whether behavioral, emotional or even linguistic. Once embedded, the very stickiness of habits means they're tenacious and hard to dislodge. And even if we are aware that they are bad for us, we find it difficult to stop. In 1954, Iain Macleod, the UK Health Minister at the time and a habitual smoker, famously chain-smoked through a press conference about the dangers of smoking and lung cancer despite being convinced of the link between the two.

We can also be quite unaware that some of our actions are habitual. For example, we might make a cup of tea and add a couple of biscuits on the side (not realizing that we add that same couple of biscuits every time we make a cup of tea). Or we might unknowingly use particular expressions so often that we drive other people mad (if we were ever to read a transcript of our conversations, we'd probably be horrified to hear the number of “you knows” or “likes” or “super-this” and “super-that” that punctuate our everyday lexicon). Or each

morning at work, we might find ourselves “unable to function” without a first cup of coffee. These are all habitual behaviors that become fixed in our neurological patterning. Sometimes, our habits are so embedded in our subconscious that they get us running on autopilot. When we're driving a familiar route, for instance, we might have no conscious recollection of any details of the journey. Or, while trolleying our pre-ordained circuit through the supermarket, we probably won't notice anything about the other people we pass, but we're totally thrown if the layout of the store and product display has been altered.

This article is Part One of a three-part series in *Alert!* looking at habits in depth. Part One examines the theory behind habit formation and what we can do to put a stop to stickily engrained bad habits. In Part Two we go on to explore ways of creating new (better) habits in our lives such as committing to take regular exercise, keeping in better touch with friends and family, eating more healthily or reading more often. Part Three looks at how we can measure habits and habit strength.

Why habits form

Habits serve a significant purpose – certain behaviors become automatic simply to make us more efficient. We can all recall being in a totally new environment, perhaps working abroad or visiting friends with a very different lifestyle. It's often disorientating and awkward. Everything seems to take much longer because every single choice and behavior requires 100 percent of our attention. Eventually, though, new habits develop which make our lives much smoother and more fluid... and these new habits actually free up our minds so that we can do other things in parallel. As Theodore Roosevelt said, “Habit and routine free the mind for more constructive work.”

How habits form

Our habits are deeply engrained in our brain and muscle memory, so much so that they become automatic. We can define this autopilot behavior with three qualities:

- Minimal awareness – we can carry out the action without needing to pay much attention to what we are doing.
- Efficiency – we can carry out a habitual behavior in parallel with other activities that demand more attention.
- Lack of control and conscious intention – we do things without conscious intention or desire and it's actually difficult to stop

¹ Neal, D., Wood, W., Quinn, J. 'Habits – A repeat performance' 2006, *Current directions in Psychological Science*, Vol 15, No. 4, p198.

ourselves from doing them or doing them differently.²

- Habits are believed to be formed through the interaction of three elements. Charles Duhigg, author of the book *The Power of Habit*³ defines these three as:

- trigger or cue
- routine
- reward

Each element plays a particular role in embedding the habit. (Also see diagram below.)

The trigger or cue is the signal to carry out the habitual routine. For example, leaving your trainers by the side of your bed might be the cue you need to get up and go running first thing in the morning. Or taking a plastic bag along with you on a dog walk is the cue

2 Verplanken, B., Wood, W., 'Interventions to break and create consumer habits', 2006, *Journal of Public Policy and Marketing*, Vol. 25 (1), Spring, 90-103.

3 Charles Duhigg, *The Power of Habit: Why We Do What We Do in Life and Business*, Random House 2012.

to pick up after your pet. The trigger can also be a preceding action, perhaps a habit in itself, creating a chained series of actions or even a ritual, all of which are usually automatic and carried out without thinking.

A habit also becomes embedded simply through the act of repetition, doing an action over and over again and often in the same environment so that it becomes routine and engrained in our muscle memory. For example, driving, brushing our teeth or riding a bike all become habitual behaviors. When we first tried them, they were tricky to master (some trickier than others!). But after carrying them out day after day, they became easy and automatic. Scientists say that once we master a new task or skill, our brainwaves slow down. We become more efficient at carrying out the task and therefore have less need to think consciously about it.⁴

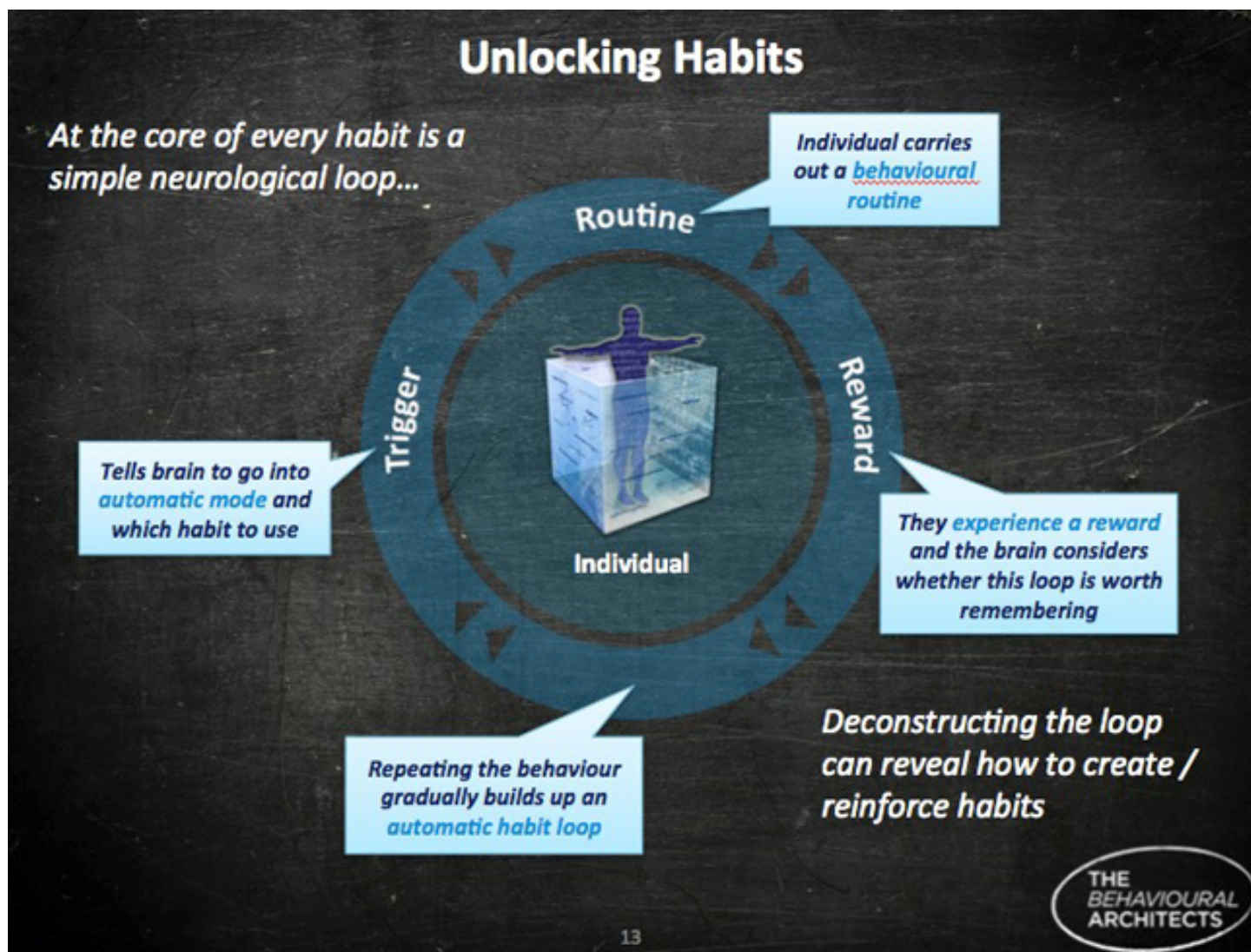
Finally, for some habits, there is also a reward attached, sometimes simultaneous

4 *New Scientist*, 'Habits from when brain waves slow down' 26th September 2011.

with the action and sometimes following it. This reward can be tangible, such as tucking into a bacon sandwich after going for a long, arduous run. Or it can be physiological, such as the dopamine release which provides the brain with a "feel-good" reward during or after an activity. Or it can even be subconscious, such as a sense of achievement at the end of a routine task.

Each of these elements (the trigger, the routine and the reward) combine to fix the habitual behavior in place. And once fixed, behavior is very difficult to change or stop. A diary-based study⁵ conducted by researchers at Duke University, North Carolina demonstrated that around 45 percent of everyday behaviors by students and other members of the community involved in the study were based on habit

5 Quinn, J.M., & Wood, W. "Habits across the lifespan." Unpublished manuscript, Duke University. See also Wood, W., Quinn, J.M. & Kashy, D.A. "Habits in everyday life: Thought, emotion, and action", *Journal of Personality and Social Psychology*, 83, 1281-1297.



(routine behaviors, usually performed in the same location) rather than deliberate, thoughtful actions.

Charles Duhigg usefully deconstructs his own difficult-to-change afternoon cookie habit loop in his book and it's the perfect illustration of the trigger-routine-reward structure on which our habits hang. Every afternoon, he would go to the cafeteria and eat a chocolate chip cookie which caused him to gain weight. He knew it was a "bad" habit, but it was a habit that he found hard to kick. The only way to do it, he realized, was to identify exactly how the habit worked. He soon discovered that the trigger for his cookie consumption was time: between 3:00 and 3:30 pm each day, he walked to the cafeteria. The routine behavior was the cookie consumption and his "aha" moment here was discovering that the cookie wasn't actually the reward. This made it much easier to kick the habit of course. The *actual* reward was the chance to socialize with his colleagues. Once he realized this, his new routine behavior was simply to walk over to his colleagues' desks at the same time in the afternoon and have a cookie-less chat. A new and less weight-compromising habit had been formed.

As Duhigg shows, there are strategies we can apply to break habits and change our ways for the better once we understand the trigger, routine and reward. And our awareness of unconscious, habitual behavior can also be heightened by the use of clever, innovative design which can surface our habits, moving them from our subconscious to our conscious mind. We look at a few innovations in the rest of this article.

The honking habit

Anyone who has visited India will know that the urban roads are crazy and chaotic. Drivers are in the habit of using car horns frequently (for almost every occasion, in fact). They most often honk not out of anger, but to signal driver intention or simply their presence. This incessant honking obviously creates a noisy, frustrating driving experience. Decibel levels are often well past the threshold for human pain. Anti-honking campaigns have failed in the past and Audi responded to the honking problem by making their car horns both louder and more capable of withstanding the driving demands of the Indian consumer. Audi's India head Michael Perschke said, "You take a European horn and it will be gone in a week or two. With the amount of honking in Mumbai, we do on a daily basis what an average German does on an annual basis."⁶

6 *Globe and Mail*, 'Horn OK please? – Extra-loud car horns lead to growing problem of hearing loss in India', 10th September 2012.

THERE ARE STRATEGIES WE CAN APPLY TO BREAK HABITS AND CHANGE OUR WAYS FOR THE BETTER ONCE WE UNDERSTAND THE TRIGGER, ROUTINE AND REWARD

While drivers may well feel safer on the road if they can honk to announce their presence, there is a growing problem of hearing loss in urban centres in India and traffic noise is responsible for much of it. One study showed that 75 percent of traffic officers in Southern Indian cities had permanent damage to their hearing caused by daily exposure to traffic. So, no harm, then, in the work of Indian branding and behavioral design consultancy Briefcase, who tested a more behavioral-orientated solution to this problem. Their aim was simply to make drivers more aware when they had honked. They worked with Honda to add a simple red button to the dashboard. When drivers honked, this button beeped and flashed continuously until they turned it off. They also printed a little frowning face on the button. They added this design to a set of Honda City and Honda Swift cars which they then tested with 30 drivers over 6 months. The Horn Reduction System reduced honking for all drivers by an impressive 61 percent on average.⁷ The designers speculated that this removed much of the indiscriminate, unnecessary honking by the driver.⁸



7 project: Reducing honking on Indian roads

8 Watch Briefcase's own animated film at www.behaviouraldesign.com/2013/06/03/bleep-horn-reduction-system-video/.

Their design worked, not because it required drivers to consciously reduce their honking, but because it brought the action of honking to the driver's conscious attention and thus disrupted the behavior by making drivers turn off the annoying button. The presence of the frowning face also made use of injunctive social norms – things we know we shouldn't do in society – to remind drivers that honking was largely an anti-social action. The device also cleverly tracks how much drivers use the horn, silently observing and tracking behavior so that usage analysis can rely on actual behavior rather than subjective self-reports, providing the designers with far more accurate records of behavior.

Mindless eating

Another study looked into the absent-minded eating of popcorn at the cinema. We often eat mindlessly, even when we aren't really hungry. Researchers David Neal and colleagues conducted an experiment to identify the factors that disrupted or maintained the habit of eating popcorn. They took 158 participants into a cinema to watch movie trailers while also giving each a bucket of stale popcorn. Participants agreed that eating stale popcorn (as opposed to fresh) gave limited satisfaction, but researchers found that the quantity of popcorn they ate was dependent on a different factor. One group was told to eat the popcorn normally using their dominant hand while a second group was told to eat using their non-dominant hand (so if someone was a right-handed eater, they had to use their left hand to eat the popcorn). They found that those using their non-dominant hand ate significantly less than those using their dominant hand. It worked because eating with their non-dominant hand was not an automatic, habitual behavior and so required conscious attention.⁹ "Habit change may require interrupting fluid habit execution," the researchers said.¹⁰ (Of course, it should be pointed out that, regardless of which hand they used, all the participants consumed some of the *stale* popcorn because the habit of eating popcorn when at the movies is so deeply engrained!)

9 Neal, D., Wood, W., Wu, M., and Kurlander, D., 'The Pull of the Past: When Do Habits Persist Despite Conflict With Motives?', *Personality and Social Psychology Bulletin*, 2011, OI:10.1177/0146167211419863.

10 Want to eat less? Try using your non-dominant hand, *BPS Research Digest*, 30 September 2011.

Another study into mindless snacking was conducted by behavioral scientist Brian Wansink who looked at how to make consumers more conscious of the amount they were eating by using color to alert the brain. He found that inserting edible, serving-size markers – dyed red – into tubes of chips helped to curb overeating among 98 college students. In addition, the markers made students much more accurate in estimating how many chips they ate. In the first study, the red markers were interspersed at intervals, each designating one suggested serving size (equating to seven chips) or two serving sizes (14 chips). Students who were served tubes of chips containing the red markers consumed about 50 percent less than the control group.



The red markers also led to a more accurate estimation of actual consumption. On average, students eating the chip tubes without dividers underestimated their intake by 12.6 chips while those with red markers were off by less than one chip. Wansink commented, “an increasing amount of research suggests that some people use visual indication – such as a clean plate or bottom of a bowl – to tell them when to stop eating. By inserting visual markers in a snack food package, we may be helping them to monitor how much they are eating and interrupt their semi-automated eating habits.”¹¹ So giving feedback allows us to consciously measure how much we are eating and make us more aware of the amount we have consumed.

Let there be light

Not only do we sometimes mindlessly overeat, we often needlessly waste energy in the home simply because we are not in the habit of turning off appliances. We habitually leave the TV on standby or forget to turn off a lamp. Design can help by alerting our conscious minds to our neglectful behavior.

11 Geier, A., Wansink, B., & Rozin, P., ‘Red potato chips: Segmentation cues can substantially decrease food intake.’ *Health Psychology*. 2012 May; 31(3):398-401. doi: 10.1037/a0027221.

...WE ARE USED TO MEETING THE NEEDS OF OUR CLIENTS WHETHER IT IS GOOD FOR THEM OR NOT. BUT WHAT WE ACTUALLY NEED TO INSTILL CHANGE IS 'FRICTION'

Dr. Marc Hassenzahl is Professor for Experience Design at the Folkwang University of Arts in Essen, Germany. He studies non-coercive design and has developed a number of solutions to make us more conscious and aware of our unconscious behavior.¹²



One is the “Forget-me-not” light, a reading lamp that has to be periodically touched to stay on, making users conscious of the fact that the lamp is providing light for them. After being switched on, the lamp gradually closes its petals like a flower, and its light slowly dims. If one of the petals is touched, the lamp re-opens and shines brightly again.

Another is the “Never Hungry Caterpillar,” an extension cable that remains still when a TV or similar device is on but that goes nuts when switched to standby, twisting and turning and appearing to writhe in pain. The movement is intended to catch our attention and bring our neglectful behavior into our consciousness and it’s a far more effective method than the passive red standby light on the TV. This alternative design creates a visible, movement-based, highly emotional cue to tell us that we are wasting energy. We can almost feel the caterpillar’s pain.

Hassenzahl says, “Contemporary design is not used to making things troublesome. We are used to making things convenient.

12 Things with attitude:Transformational Products, *issuu*.

We are used to meeting the needs of our clients whether it is good for them or not. But what we actually need to instill change is “friction.”

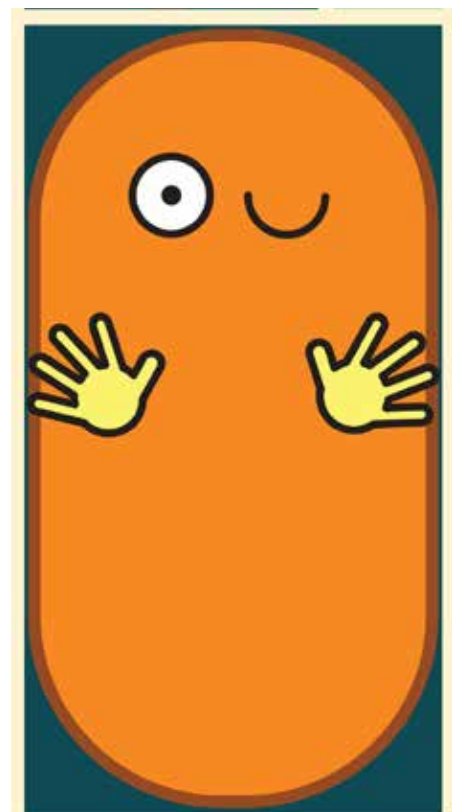
Conclusion

Repeat after me:
Trigger, routine, reward
Trigger, routine, reward
Trigger, routine, reward
= HABIT

The behavioral sciences have given us a simple model for understanding the architecture of how and why habits are formed. By thinking about or surfacing an existing or desired habit loop and defining the triggers or cues that establish it as well as the psychological rewards that cement the circuit, we can see how habits can be made or broken by using behavioral design or by changing the environment. And because habits are the backbone of all of our behavior, this gets everyone excited. ▼

Crawford Hollingworth is a founder of The Behavioural Architects. He has a background in applied social psychology and was formerly global executive chairman of The Futures Company. www.thebehavioralarchitects.com

This is Part One of a three-part series looking at habits in depth.



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ADVANCING FROM INSIGHT TO IMPACT

By Julie Wittes Schlack



We've all keenly felt the pain of having a great insight that we've been unable to propagate throughout our organization or that of our client

Several years ago, one of my clients enlisted their private online consumer community to rank a roster of potential celebrity endorsers for the brand's weight loss product. But the feedback from this group of approximately 300 loyal, engaged consumers was overwhelming and not at all what our client was seeking or expecting. "Don't do it," these men and women advised. "Don't dilute what you stand for and turn your brand into another 'me-too' product!" They were passionate and clear in saying that any celebrity spokesperson ran counter to the essential positioning of the brand as one that didn't promise miracles but instead empathized and aligned itself with the real struggles of real people.

Alas, their voices weren't heeded. The brand management invested significant spending in a highly visible campaign that flopped badly. Sales plummeted and recovered only a couple of years later when the brand re-embraced its original identity and promise.

Unfortunately, this experience isn't unique. At some point in our careers (more likely at many points), we've all keenly felt the pain of having a great insight that we've been unable to propagate throughout our organization or that of our client. We've seen bad decisions made when we should have – and did – know better.

Some of the fault lies with traditional marketing research practices. We can be too slow in getting answers and too pedantic in presenting them. We issue reports rather than tell stories. We sample consumers as respondents rather than engage with them as partners. But there are broader cultural and organizational dynamics at work as well. All too often, research is internally perceived as a cost of doing business rather than an investment in it, as providing validation or justification for business decisions more than as a strategic driver to make those decisions.

So how can we elevate the role of researchers? What specific tactics are visionary consumer insights specialists using to infuse their companies with the consumer voice? And how are they persuading their colleagues that doing so will ultimately drive business growth?

Why Consumer Insights Are a Strategic Business Asset

At our organization, we have seen that powerful connections can develop when customers and companies collaborate. But we needed evidence that the strength and quality of the customer-company relationship drives business growth – evidence that would equip consumer

insights professionals to make the case that companies that are truly customer-centric, that infuse the customer voice into all they do, realize superior marketplace performance.

Our premise was that customer-centric companies should feel different to customers than those that are not. Companies that have done a good job of designing the customer into the organization should have better customer "intuition" than their competitors. Customers should feel that customer-centric companies really "get" them, listen to them, respect them and provide them with intangible, emotional benefits that better meet their needs.

To that end, we developed a Customer Quotient (CQ) survey that takes into account familiar measures of loyalty and experience but reframes them through the customer's lens. Most customer satisfaction and customer experience measures frame questions in terms of what consumers will do for the company – "Will you recommend me? Will you purchase from me again? How was your experience with me? Are you satisfied with me?" But we tried instead to capture what "corporate empathy" might feel like from a customer's point of view – "Do you really 'get' me (more than other companies)? Do you speak my language? Do you share my values? Do I feel smart and proud to be your customer?"

The CQ survey was designed to solicit consumers' largely unaided evaluations. Rather than ask people to rate a prescribed list of companies or brands (that they may not be very familiar with), we asked them to think of a company that "really got them," choosing from drop-down lists or writing in their own company or brand name. They then rated that company and brand on about 20 attributes as well as three loyalty statements that serve as outcome measures. After rating the company they chose as having good "intuition," we asked them to think of a company that had terrible customer intuition and then go through the same rating process. So, all in all, each study participant rated two companies – one that had good intuition and one that did not.

We fielded this survey to 15,155 U.S. consumers. As expected, we found company CQ, customer satisfaction and customer experience are all positively and significantly related. The more striking finding is that companies scoring high on CQ tend to have stronger marketplace performance. There are clear and consistent links between high CQ and the four business metrics we studied. Indeed, *CQ was more consistently related to business performance than either customer satisfaction or customer experience.*

Relationships between CQ, Customer Satisfaction, Customer Experience and Business Performance†

	CQ Score	Customer Satisfaction	Customer Experience
Return on Assets	0.42** (n = 50)	0.22 (n = 46)	0.35* (n = 41)
Return on Assets, relative to industry	0.24* (n = 50)	0.08 (n = 46)	0.26* (n = 41)
3-year Average Revenue Growth	0.28* (n = 50)	0.13 (n = 46)	0.09 (n = 41)
3-year Average Revenue Growth, relative to industry	0.25* (n = 50)	0.10 (n = 46)	0.19 (n = 41)

* = $p < .05$

** = $p < .01$

† = for all companies with 100+ mentions

The consistent, favorable findings for CQ are encouraging. They offer some compelling evidence that delivering against customer-defined criteria – some quite “off the beaten track” for traditional outcome measures like the extent to which companies share their values or provide emotional benefits – can serve as a roadmap for companies striving to be more authentically customer-centric. By focusing on what matters to customers, as defined by customers, companies can create competitive advantage.

So You Have the Evidence. Now What?

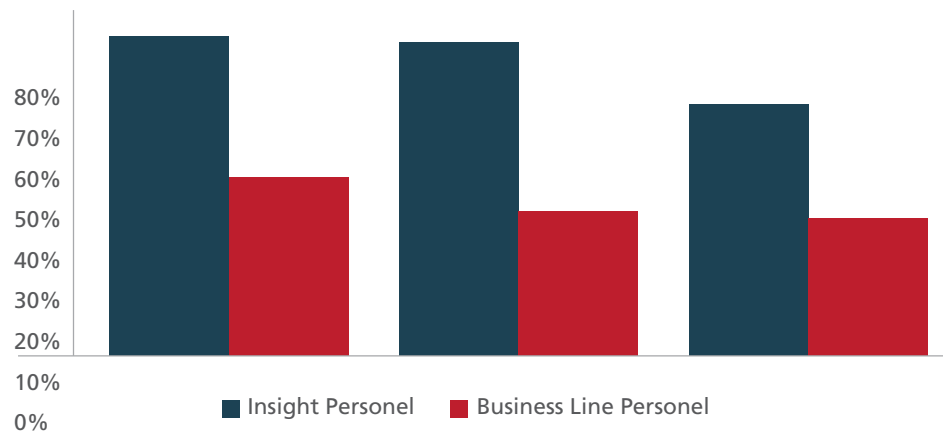
A few years ago, BCG did a sobering study of the perceived effectiveness of insights professionals. The gray columns show how consumer insight professionals view their success with driving results; the red columns show how the lines of business perceive insight teams' effectiveness. The results were sobering.

As you can see, the gaps are significant. As an industry, we have overestimated how well we understand the business issues, our ability to say “so what?” based on the data and our effectiveness at making clear recommendations to executives. Clearly, we need to identify the barriers to impact so that we can confront and conquer them.

To that end, over the past year, we conducted interviews with over 50 current and past clients, largely Directors, Vice Presidents, and Senior Vice Presidents drawn from the ranks of client companies that are outperforming their competitors. Eight clear themes emerged from these interviews, representing barriers to impact and strategies for overcoming them.

1. **Synthesize what you know.** It used to be that data collection was time-consuming and costly. And the balance of our time and resources was spent on that. Now, data is plentiful...too plentiful. “If we only knew what we knew,” one client said. Another echoed that sentiment,

Our consumer insight or market research personnel...



Source: BCG Consumer Insights Study

noting that, “We are more likely to spend forty thousand dollars on research than we are to spend forty thousand dollars on a person to interpret the research.”

We need to shift that balance to spend more time and resources synthesizing what we know. Our value lies in being able to interpret findings and motivate the business to act on insights. That suggests that we should be investing not just in accruing more data, but in the technology and people that will enable us to look across data sets and sources. More importantly, it requires us to re-allocate resources to spend equal amounts of time (or even more time) synthesizing, interpreting and marketing insights.

2. Collaborate. Actionable insights are co-created, not simply found.

Sometime in your career (hopefully more than once), you’ve experienced the “aha” that comes from connecting the dots between findings. When this happens, you “own” the insight because it is something you created yourself. In our interviews, we found that clients used words like “fashion,” “harvest,” “craft” and “create” when talking about insight generation and actually engaged their business partners in creating

insights with them, taking an inherently individual and internal event and making it social and interpersonal. By doing so, they instilled a sense of creation and ownership in the very people they needed to influence in order to achieve impact.

So involve your business partners in this way. Invite people with a diversity of perspectives, expertise and functional accountability to collaborate and co-discover insights. By doing so, you’ll ensure that the insights they fashion, themselves, will be relevant to their business.

3. **Inspire through immersion.** How can you help stakeholders generate and own insights? One way is to immerse your internal clients and their clients in rich consumer data that engages them and helps them make new connections.

For example, one hospitality client of ours was looking to expand their business into mainland China. It was critical that the brand resonate with Chinese parents, but Western executives based in the U.S. did not really get the plight of Chinese parents whose children’s lives are scheduled and booked solid every hour of the day. Our client took advantage of quarterly Steering Committee meetings

to immerse executive stakeholders using the insights from two online communities of mainland China consumers. Together, we hung “clotheslines” of images around the meeting room, showing member faces and a few stats about them. We passed out member “time capsule” letters they had written to their children 20 years in the future, and had select executives read them out loud. We posted members’ visual diaries of their children’s daily activities, which really emphasized how overscheduled children are and how little “free time” exists for play. Immersing executives by sharing consumers’ lives with them in a humanistic and holistic way helped them recognize their knowledge gap, and it led to more customer-centric decisions about the business in mainland China.

4. **Get closer to the business.** Many of the clients we spoke with prefaced the interview by explaining that they weren’t “real” marketing researchers. Instead, they had been on the brand side, had come from an agency, and many had not been formally trained in research. But this meant that they were close to the business. That may sound obvious, but it’s telling that this theme came up over and over again. Impact is not possible without it.

That may require on-the-job training. Formal schooling in research focuses on methodology and statistics; it does not necessarily equip students to be amazing communicators and marketers of their findings. And deep knowledge of business comes from actually being in business and being accountable for business results. We have to provide this kind of experience on the job to develop this knowledge and skill set.

But we also have to be selective about what projects we take on. If the business need was not clear, our most successful clients saw it as their role as consultants to push back and get that clarity rather than invest in obtaining and reporting an answer with no actual implications.

5. **Evoke** We often think of power in terms of data, of quantitative findings and statistics. But in many ways, qualitative information is far more powerful. When your goal is to create a reaction in another person – to get them to feel something, see a different point of view, take the consumer’s perspective – you need to make that other reality viscerally real and immediate.

That requires us to evoke the insights that arouse both curiosity and empathy. For example, when a health and beauty

We need to shift that balance to spend more time and resources synthesizing what we know. Our value lies in being able to interpret findings and motivate the business to act on insights.

client was working on a sub-line extension of one of their major brands, they wanted to focus on unique fragrance options. So we explored the evocative qualities of scent in a broad way through multiple methods in communities. We had people provide video and pictures, which they wrote stories about; we had them create mobile ethnography to capture intriguing or favorite scents in the moment; and we also had them free associate via mind-mapping. Bringing people’s experience of scents to life in this way enabled our client to think outside the category and ideate rapidly.

6. **... Then provoke through powerful storytelling.** I know, the term “storytelling” is painfully overused these days. So let’s be specific and prescriptive. Every good insight story needs to have three components:
- Data...but data shown in a way that is accessible to laypeople. Insights must be grounded in data and they must be clearly explained.
 - Emotional resonance. You have to make the data and insights human and real for the audience to actually move people to action. After all, it’s the human connection, not the numbers, that really inspires action and impact. And humanizing the data is especially crucial when you think people will question a finding, when your insight is bucking an established point of view or when you need to convey the severity of the issue or opportunity.
 - Business relevance. You have to relate findings to industry trends or company objectives throughout the story, using language that’s colloquial and meaningful to your business partners and offering recommendations that speak directly to pressing business challenges or opportunities.

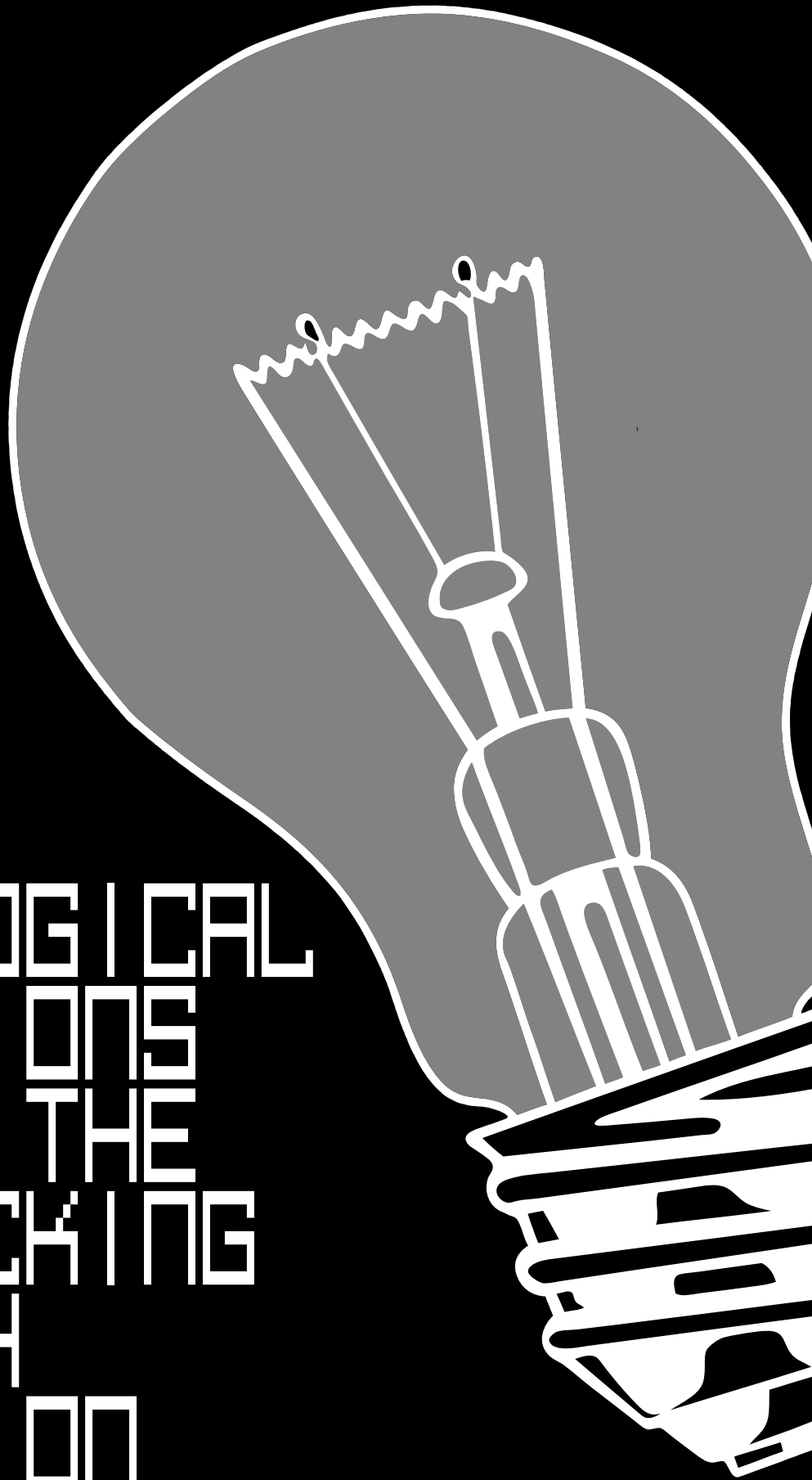
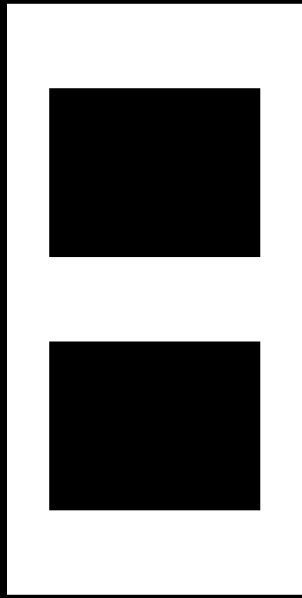
7. **Match your approach to your audience.** “We think, well, we presented it, so we’re done,” observed one of the clients we interviewed. “We couldn’t be more wrong.” The PowerPoint presentation, whether delivered live or via email, is generally not sufficient to move people to action.

Our most successful clients employ a number of strategies to more actively engage their internal stakeholders in interpreting and acting on insights. They workshop results in person and create immersive experiences. They employ a range of social and digital technologies, whether by using internal messaging systems to bring customer quotes front and center or using data visualization technologies to draw people in. Those that still live in PowerPoint cultures are disciplined about keeping their communication concise and targeted. And – because it’s worth being redundant on this point – they devote as much time and money to internally marketing them as to generating them.

8. **Be less confident and move faster.** “Insights are perishable,” one of our clients told us. By the time you net it out, the business has moved on to a new problem.” She was implicitly saying that timely insights are often more important today than statistical significance. Indeed, another client flat-out told us, “We need to move decisively with ‘good enough’ information.” The language of uncertainty and probability is actually more accurate than “yes/no” insights. We shouldn’t act rashly, of course, but we do need to feel comfortable with a more agile approach, moving quickly, incrementally, and with a willingness to “fail faster.”

Moving from insight to impact requires marketing researchers to revisit some sacrosanct beliefs in the face of a much faster-paced and more dynamic environment. It demands that we think about not just the facts, but also the narrative that will help our stakeholders internalize them. It calls for a range of skillsets and a willingness to experiment. But as our CQ data shows, strong relationships fuel customer-inspired growth. As marketing researchers, if we relentlessly infuse their organizations with the customers’ perspective and voice, our impact will be enormous. ▼

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TECHNOLOGICAL
INNOVATIONS
DRIVING THE
EYE TRACKING
RESEARCH
REVOLUTION

By Mike Bartels



Eye tracking is the only methodology that can be used to record and analyze true visual experience. This cutting-edge technology allows marketing researchers to literally see through the eyes of the participant

Marketing research is a broad and diverse field, one that does not lend itself easily to blanket characterizations. It includes the study of advertising, signage, retail, packaging, products, services, devices, media, websites and just about every other salable stimulus that people encounter in their daily lives. Because there are so many different areas, simple descriptions of “what we do” typically fall short. However, I submit that there is one statement that can be applied globally to our field:

Marketing researchers seek to see the world through the eyes of the consumer.

Whether you are evaluating Super Bowl commercials or super-absorbent paper towels, it’s safe to say that at least part of the goal of your research is to understand the personal experience of the people that you are testing. And where does that personal experience come from? What is the means by which consumers *see their world*? It’s vision, of course – the sense of

sight. By some estimates, 90 percent of the information that humans perceive is visual, and that includes the entire spectrum of our experience in the marketplace – every site we visit, every sale we see, every billboard we pass, every shop we browse and every item we consider for purchase.

Eye tracking is the only methodology that can be used to record and analyze true visual experience. This cutting-edge technology allows marketing researchers to *literally* see through the eyes of the participant. The resulting data is incredibly useful as a means of evaluating current designs, testing new concepts and developing a better understanding of the customer’s perspective overall. The applications are endless and yet the adoption of eye tracking by businesses has been relatively slow. Given the value of understanding shopper attention, using this tool seems like a no-brainer. So why isn’t every research department in every company in the world making use of eye tracking?

The answer to that question has a lot to do with the slow pace at which the technology has developed. One might aptly describe the early days of eye tracking as “clunky.” Systems were cumbersome, fielding was complicated, data management was slow and analysis was convoluted. This is obviously not the best situation for collecting naturalistic data and turning it quickly into results, but a lot has changed in the last few years. Currently, we are witnessing an eye tracking revolution where many of the barriers-to-use have been bulldozed by high-tech advancements. Following are eight recent innovations that have elevated eye tracking from a *clunky* study add-on to a simple, effective and complete research tool.

#1. Unobtrusive Wearable Eye Trackers for Real-World Testing

For decades, “head-mounted” eye trackers have enabled research in real world environments (i.e., outside of the lab). However, early versions of these systems obstructed the view of the participant, required tethering to a powerful computer and were generally uncomfortable to wear. Studying consumer behavior is a delicate exercise and this model of eye tracker was distracting, to say the least. Fortunately, the “head-mounted” systems of the past have given way to the “wearables” of today. These new systems are no more obtrusive than a pair of glasses. Setup is simple, connection to a computer is not required and, best of all, the data can be observed by the researcher in real time. This newfound capability to collect accurate data in a natural testing scenario with live video feedback makes eye tracking a much better fit for marketing research.

There are several areas that have been positively impacted by these new wearable systems, including testing of outdoor advertising, in-home media and mobile devices. By far the biggest beneficiary of this innovation has been retail. The ability to slip a discreet eye tracker onto a customer and record what they see in a real store browsing real products during a real shopping trip has been a game changer. Now that this data can be collected in a realistic manner, more companies than ever are including eye tracking as one of their primary shopper-testing methodologies.

#2. Portable Systems for Portable Research on Screen

Screen-based eye trackers did not suffer through the same kinds of growing pains as head-mounted systems. Fifteen years ago, if you wanted to test a website on a computer, you could have done so in a way that felt natural to the participant – no heavy headset, no difficult calibration, no restriction on movement. It was a delightfully straightforward method to employ. That is, unless it was necessary to test outside of your lab. For research that was taking place offsite or – heaven forbid – in multiple locations, it was necessary to bring along a bulky eye tracker, a desktop computer, and a variety of cords, cables, splitters and switchers. Packing was time-consuming. Shipping was expensive. Setup and configuration were a headache. To put it simply, portability was a major issue.

Fast-forward to the present. Now, I can stick an eye tracker in my pocket, grab my tablet, walk down to the coffee shop and be collecting data on the patrons there in minutes. Today’s screen-based systems

are ultra-portable and instantly configured to collect accurate data on-the-go. That adds an important element to eye tracking: agility. Because digital design moves fast, research methods must be quickly deployable or else they will not factor into the end result. The average type-A Silicon Valley dynamo is much more likely to use the technology if they can avoid asking questions such as “*Is the eye tracker set up? Can we reserve time in the lab? How quickly can we recruit participants to our office?*” The smaller, simpler systems that are now available make it realistic to perform agile testing of anything anywhere at any time.

The answer to that question has a lot to do with the slow pace at which the technology has developed. One might aptly describe the early days of eye tracking as ‘clunky.’ Systems were cumbersome, fielding was complicated, data management was slow and analysis was convoluted.



#3. Cloud-Based Platforms for Data Management and Live Streaming

While the systems themselves were shrinking, eye tracking had another *size* problem to solve. As anyone who has ever run a study will attest, the files can get very large. That’s because an eye tracker collects thousands of data points every minute and renders that data onto a high-definition video of each participant’s point-of-view. This can add up to several gigabytes which then must be transferred from the fielding team to the analysts. Before the days of lightning-quick Internet, this often meant resorting to (gasp!) sending discs or hard

drives in the mail. At the end of the project, the same approach was required to send HD videos and multimedia reports to the client. Most researchers need results as soon as possible and having the data sitting idly on a mail truck for multiple days as the deadline approaches is far from ideal.

High-speed Internet has changed just about every business and eye tracking is no exception. Data can now be uploaded and downloaded using cloud-based platforms, effectively eliminating data transit days. On the back end of the project, the same platforms can be used to share results with the client, which not only saves time, but also makes distributing reports easier. Perhaps even more important than the storage functionality of cloud-based platforms is the streaming. In the new *connected* eye tracking workflow, clients and stakeholders can watch live video during data collection from anywhere. Forget about waiting a week or more to see the world through the eyes of your customer; now you can login and do it in real time from the comfort of your own computer.

#4. Computer Vision: Eye Tracking Software That Sees

The first three innovations mentioned evolved slowly over a period of years, but this next one represents a great leap forward. In real-world environments, the cost in time and resources to analyze eye tracking data has always been a roadblock. Wearable eye trackers allow participants to roam freely, which is great for testing a natural experience but creates problems in synthesizing the data. In order to aggregate data from multiple participants shopping in a store or reading a magazine or using a mobile device, it is often necessary to manually code the attention of each participant through video analysis. This can be a slow and tedious process.

Technology, however, has come to the rescue once again. The latest generation of analysis software for wearable eye trackers includes sophisticated *computer vision* functionality, which automatically maps the attention of each participant onto the appropriate area of the stimuli. For example, if you are testing a new display in a retail store, you are no longer required to review each participant’s eye tracking video and manually code every fixation onto an image of the display. Computer vision does it for you by processing each frame of each video, identifying the display of interest and instantly transferring the data onto the stimuli. This real-world mapping of data provides researchers with aggregate heat maps, gaze plots and viewing statistics faster, cheaper and in a more reliable manner.

#5. Integration With Biometric Data

As eye tracking has become more natural, convenient, efficient and affordable, a variety of other research technologies have progressed in kind, most notably biometric tools. There is obviously a lot more to consumer behavior than eye movements. That's why eye tracking is usually paired with qualitative methods to fill in the blanks. Today, we're able to go deeper than that, much deeper. Several technologies that measure how our minds and bodies respond to stimuli are now optimized for marketing research, including electroencephalogram (EEG), galvanic skin response (GSR), electrocardiography (ECG) and facial coding. Tools such as these are designed to capture the *inner experience* of ads, media, websites, products, stores, etc.

Biometrics can provide a new dimension of insight to your findings, especially when synchronized with eye tracking data. By analyzing *where consumers look* alongside *how they emotionally and cognitively respond*, researchers are able to identify the specific elements of the stimuli that are most impactful. Which segments in a movie trailer generate a positive emotional reaction? Which features of an e-commerce site cause stress or confusion? Which package on the shelf is associated with brain activity consistent with desire-to-purchase? By combining eye tracking with biometrics, we can now address such questions in an objective way based on human physiological response to individual elements of marketing materials.

#6. Integration With Environmental Information

So we have biometrics to examine the *inner experience* of the consumer, but what about the *outer experience*? Understanding *where people go* is an important component of understanding their behavior. Imagine, for example, a study of advertising within a sports stadium. Eye tracking a sample of spectators at a game can be extremely powerful in assessing the most visible ad placements, and yet this data is even more impactful when "location" information is included as well. Knowing exactly which areas people visit, along with which ad executions they notice, provides the full picture of marketing effectiveness.

The great potential of beacon technology has been recognized in many spheres of marketing research. These devices are capable of capturing the location of your participants within a consumer environment and following their path from entry to exit. Not surprisingly, eye tracking researchers have been among the first to adopt beacons into their studies and

synchronize the visual attention of shoppers with their physical location. Beyond beacons, some eye tracking hardware systems have integrated positional data by including a gyroscope and accelerometer within the eye tracker itself. This ability to directly apply information from these sensors to eye tracking data will improve the quality of fixation data and enhance 3D mapping in real-world testing scenarios.



Fortunately, the “head-mounted” systems of the past have given way to the “wearables” of today. These new systems are no more obtrusive than a pair of glasses.

#7 Virtual Reality (at Last!)

From *actual* reality, we now move to *virtual* (VR) reality. Practical VR has been on the horizon for a long time, and it seems that, with new systems like Oculus, Morpheus and HoloLens, we are finally there! The ability to study participants in an artificial, computer-generated store environment offers exciting research possibilities. In this next-generation approach, eye tracking potentially serves two purposes: (1) the virtual scene is responsive to the participant's eye movements, and (2) the researcher can analyze attention to marketing elements within the environment.

Studying shopper behavior in virtual environments is admittedly more technically complex than research in real stores, but it offers important advantages. Most importantly, it allows for testing of new packages, new planograms, new displays and new signage without the need to physically produce the materials or modify an existing store. Another advantage is that the virtual store is controlled by the researcher and thus the environment is

consistent during all shopping sessions. That means no poorly-stocked shelves or aisles closed for cleanup or disorganized displays. These logistical and scientific benefits make eye tracking research in computer-generated stores a useful option for certain types of studies.

#8. Build-Your-Own Eye Tracking Analysis Tools Using Software Development Kits (SDKs)

Eye tracking will never be a *finished* technology. Because this tool is so versatile, researchers continue to find new and amazing ways to apply it. Much of the innovation is driven by companies specializing in eye tracking but it is more than just a factory-made, “black box” product. Manufacturers of eye tracking hardware and systems have recently released SDKs for their products and have thereby opened up eye tracking to a wide variety of novel, specialized uses.

Access to SDKs means that all your company needs to create customized eye tracking applications is (1) a developer and (2) a *big idea*. Today, several brands and research providers are using eye tracking data to meet unique business objectives by doing the programming on their own. This includes new ways to visualize eye tracking data, new metrics to describe consumer behavior and integration of eye tracking data with other types of results. The possibilities for adapting eye tracking to your research goals are endless now that everyone can access the SDK.

Conclusion

It's certainly an exciting time to be studying consumer visual behavior. The items discussed in this article represent major advancements in the field of eye tracking and have resulted in a more natural, efficient and powerful research tool. For eye tracking practitioners, that means better return on investment as well as greater freedom to execute *your* project on *your* terms. Word is beginning to spread about this *less-clunky* iteration of eye tracking. The number of marketing researchers using it is on the rise and the insights of this growing community will undoubtedly continue to fuel the fire of innovation. ▼

Mike Bartels is the research director at Tobii Pro Insight Research Services in North America. He has more than 10 years of experience designing, conducting and analyzing eye tracking studies. Bartels has a master's degree in social psychology and has written eye tracking-related articles for several marketing research magazines and scientific conference proceedings.

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How the Subconscious Triggers Action

By Kirk Hendrickson

Have you ever looked down at your shopping cart during a grocery store trip and thought, “Why did I choose these items?” After all, supermarkets carry thousands of products (according to the Food Marketing Institute, the median number is 42,214), and you could have selected any of them. What made you decide to pick these specific products?



When asked, most people will try to come up with logical reasons – I ran out, I like this brand, my friend recommended it, it was on sale, etc. But eye tracking research reveals that many purchase decisions aren't driven by logical considerations; in fact, they aren't driven by conscious consideration at all. Most of our shopping choices are made on a subconscious level, triggered by a combination of perception and emotional response.

This subconscious buying behavior, which we've observed consistently in our eye tracking studies, has enormous implications for brands and marketers, affecting everything from package design to advertisements to shelf placement. Understanding how the subconscious mind interacts with a product could be the key to its success.

The Subconscious Mind

The word “subconscious” literally means below awareness. This level of the mind

is not well defined or understood, but it nevertheless has tremendous power over human perception and behavior. Almost all brain activity happens on a subconscious level. Estimates vary, but perhaps a mere 10 percent of information ever reaches the conscious mind. As Freud put it, “The conscious mind may be compared to a fountain playing in the sun and falling back into the great subterranean pool of subconscious from which it rises.”

One of the difficulties in assessing subconscious behavior is that, once we start actively thinking about it or talking about it, it's not subconscious anymore. The best way to catch the subconscious mind in action is to observe a subject's natural behavior, such as with eye tracking.

Eye Tracking

Eye tracking allows us to precisely observe what shoppers are looking at and how that affects their decision-making. We ask shoppers to wear a small headset with

a built-in camera that catches even the most minuscule eye movements. The eye tracking devices we use are unobtrusive, so shoppers can easily go about their usual grocery ritual.

After shoppers complete the shopping trip, we often survey them about their shopping experience. We also watch the video with shoppers and ask them what they were thinking in each moment.

When we analyze the data and compare it with the shoppers' conscious thinking and recollections, it becomes clear that the vast majority of visual information travels through the eyes into the subconscious mind and never reaches the conscious level. But it's also clear that the information stored in the subconscious is influencing buying behavior.

Vast Visual Onslaught

Think about how much information is in front of your eyes in a grocery store: colors, shapes, movement, lights, pictures, text and

more, all vying for attention. Your eyes are remarkably good at filtering the information and bringing the important stuff to your conscious mind: “You’re about to run into that shelf” or “That cake looks yummy” or “Those cans of soup are three for the price of one.”

But before any of those thoughts reach the surface, that information is just part of the “subterranean pool” of visual data that your eyes filter into your subconscious mind. And in order for data to make it even that far, your eyes have to take it in.

Fixations

When observing a scene, your eyes move abruptly, not continuously. Movement occurs every three to six seconds, and in between your eyes are still. The movements, called “saccades,” last about 20 to 40 microseconds, and you are likely unaware that they are happening at all. The still periods, which last 100 to 400 microseconds, are called “fixations.” Your brain can only take in information from fixations – anything seen for under 200 milliseconds is lost.

The fixation location is very small; you can only perceive information approximately two degrees around it. Beyond this narrow area of focus, visual information turns coarse and fails to get processed.

When we watch eye tracking videos, we can see when the shopper’s eye is in fixation mode and what it fixates on. From that information, we can diagram a surrounding area within two degrees of the fixation point to illustrate everything that the shopper saw. This is the information that was sent to the subconscious mind.

Many purchase decisions aren’t driven by logical considerations; in fact, they aren’t driven by conscious consideration at all

The Consideration Set

Shoppers can fixate on a tremendous number of items in a short period of time. In one study we performed in a music store, one subject fixated 245 different times in five minutes. That’s 49 items per minute. In a half-hour trip, the shopper would have some 1,800 fixations. The subconscious mind can take in that much information, but processing it into conscious thought and memory would be impossible.

When you shop, your subconscious mind is constantly filtering information into a “consideration set” of items that could

be worth bringing to the conscious level. Grocery stores tend to arrange aisles and shelves in a similar way, so the subconscious mind already knows approximately where the items of interest are. The cereal aisle is a good example: grocers put children’s cereal on the lower shelves so it will be at eye level for kids. Shoppers who don’t have children don’t even glance at the lower shelves. If a healthy cereal were placed there, the single adult would probably never see it and it would never enter the consideration set.

Another important thing that happens at the subconscious level is emotional and physiological reaction. When we combine eye tracking with biometric equipment that measures pulse, skin conductivity, brain waves and facial expressions, we can see which items cause which reactions: excitement, relaxation, confusion, positive emotions, negative emotions, etc. You may not even notice that you’re having these reactions, but they are strong enough that they can cause you to act.

Getting to the Conscious Level

The goal of brands, of course, is to sell products. But in order to do that, you have to get shoppers to fixate on the product, subconsciously enter it in the consideration set, then consciously pick it up and put it in their basket. That’s a lot of steps, and tens of

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thousands of other products are competing with yours to get shoppers to do the same thing. So how do you increase the chances of your product making it through this chain of decision-making? By maximizing the chances of each step happening.

Shoppers are most likely to fixate on things that are located in a zone from 10 degrees above eye level to 30 degrees below it. Getting onto those shelves can be the key to getting fixation, especially for new products. Our eye tracking research has found that bright colors, images with faces and movement are also ways to grab the eye.

Once you have fixation, you want to get into the consideration set. Placing your product near a competing brand increases the likelihood of shoppers considering yours instead. Private label brands know this and that's why they place their items directly next to name brands. They are counting on shoppers noticing the brand name first, but taking the private label package into their consideration set.

This is where emotion can play a huge role; if a shopper has a positive emotional and physiological response to your product, he or she is more likely to consider purchasing it. When launching a new brand or redesigning a package, you may want

to perform biometric testing to see how it makes shoppers feel. Many a product has launched and failed because its packaging caused the wrong subconscious reaction.

One of the difficulties of assessing subconscious behavior is that, once we start actively thinking about it or talking about it, it's not subconscious anymore.

After your product makes the consideration set, it needs to beat the competition by being perceived as the better product. In many cases, a shopper will impulsively go for your product without much conscious consideration, but sometimes a conscious reason is needed. Is the price lower? Does the quality seem higher? Is it familiar from all those TV ads you ran? Is the picture or text particularly compelling? When we perform eye tracking studies and watch the video with shoppers immediately following the trip, we can identify which factors affected the conscious purchase decision for (or against) a product

Eye Tracking: The Key to Uncovering Hidden Motivations

Because so much of the shopping process happens below the level of conscious awareness, marketers have long struggled to figure out why consumers make the choices they do. Just asking people is of limited value because they don't remember (or misremember) much of what they've seen. And they often don't really know, or simply make up reasons to explain why they bought certain items.

But modern technology is helping us uncover the mystery of how the subconscious drives shopping behavior. With eye tracking, we don't have to rely entirely on someone's story. We can see what happened through their eyes. ▼

Kirk Hendrickson, CEO of Eye Faster, a provider of shopper research, developed his expertise in eye tracking and shopper research while leading worldwide field operations for EmSense Corporation and product management for MarketTools, Inc. Hendrickson holds a patent for conducting surveys on mobile phones. He holds an MBA from the Amos Tuck School of Business Administration, Dartmouth College, and a BS and MS in Mechanical Engineering from Stanford University.

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KEYNOTES

Adam Alter

New York Times Bestselling Author of *Drunk Tank Pink: And Other Unexpected Forces That Shape How We Think, Feel, and Behave*

Adam Alter studies how we think and decide – and how consumers spend and save, doctors diagnose, judges punish, and investors invest. In the *New York Times* bestseller *Drunk Tank Pink*, Alter shows us that so many of those thoughts and decisions are deeply influenced by forces that escape our attention and elude our control.

Alter's academic research focuses on judgment, decision-making and social psychology. His research has been published widely in academic journals, and featured in dozens of TV, radio and print outlets around the world.

Brian Little

Personality and Motivational Psychology Expert, Author of *Me, Myself, and Us*

Instead of looking at demographic factors, researchers are now looking at the personal projects that individuals pursue at different stages of their lives and how these projects drive product choice. The result is a fundamental shift toward designing products that delight customers and promote brand loyalty.

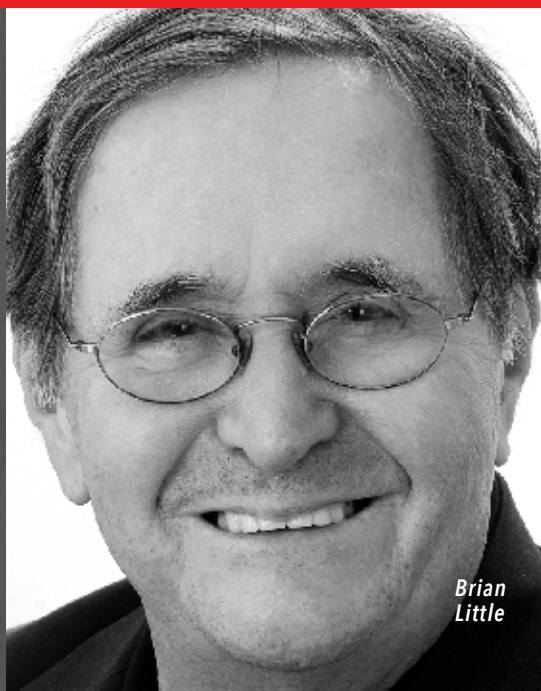
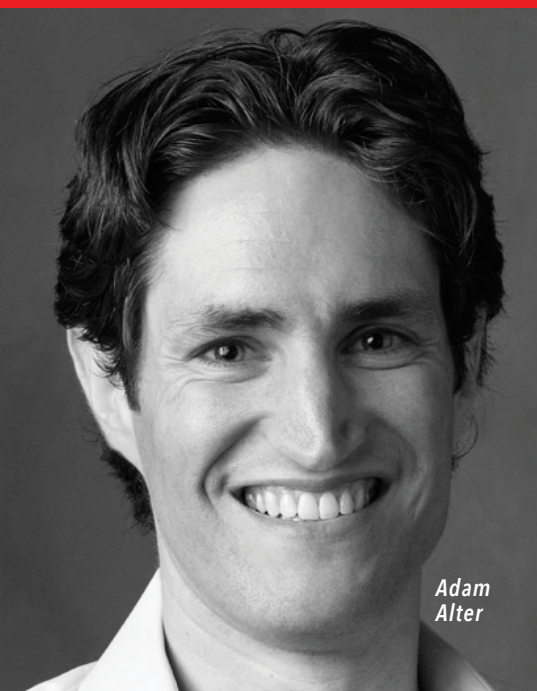
The pioneer of personal projects analysis is Professor Brian Little, currently a Distinguished Scholar at Cambridge University and a 2015 Senior Fellow at Wharton. Learn how personality and personal projects shape our brand loyalties and why this matters.

Derek Thompson

Senior Editor at *The Atlantic* and Speaker on Millennials

Derek Thompson takes a close look at the consumer habits of the Millennial generation—the most educated yet most under-employed generation in modern history. What does this demographic like to buy, wear, and drive? **Why are they purchasing fewer houses and cars, rejecting the status symbols of previous generations, and how does this affect the economy?** Thompson, a senior editor at *The Atlantic*, reveals why they think and act the way they do.

Bonus! What about Gen Z/Digital Natives? Find out why the next generation after Millennials is completely different, and what you can do to reach them.



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Millennial Myth-Busting: We Don't Know What We Think We Know

By Wayne Goodreau

Part of the fun of marketing research is when we get a chance to uncover findings that challenge our hypotheses and strongly-held beliefs. Although we aren't trying to prove the existence of Bigfoot (well who knows... maybe some of us are), busting myths through the power of marketing research can be quite a thrill...*said the nerd*. We all know that Millennials are on the minds of most researchers. How do we talk to them? What are they looking for from their brands? And what is the deal with selfie sticks? There is a lot being said about the Millennial generation and how they behave. But is it all true?

Over the past couple of years, Invoke has conducted a number of large-scale online research events with Millennials in order to explore some widely-held perceptions about them. Why large-scale focus research events? Because we wanted the statistical confidence associated with large sample sizes as well as the ability to conduct qualitative probes so that we could react to what they were telling us...in real-time.

How did we do it? Glad you asked...

A large-scale focus group is an online research event where researchers and stakeholders watch insights unfold in real-

time. Respondents are recruited and asked to log into a live event at a specific date and time. Base sizes for these sessions can extend into the hundreds, but patented software allows researchers to quickly understand the aggregate closed-end data as well as open-ended verbatims through the use of a keyword tool that quickly identifies themes and trends in the open-ends. Data filtering also occurs in real-time, thus enabling researchers to filter the results based on responses to in-session questions and thereby to understand drivers behind key metrics instantaneously.

Typically, these large-scale groups are run together with key stakeholders onsite at their offices. This creates a dynamic, collaborative environment that can inspire some interesting discussions with respondent feedback at the crux. However, for the Millennial research events that we sponsored, one of our researchers analyzed the findings in front of an online audience of market insights professionals.

Since this research was conducted over a series of large-scale online research events, the target respondent changed slightly based on subject matter, but we consistently defined Millennials as 18–34 year olds.

Let's bust some Millennial myths!

Millennial Myth #1: Millennials are all about cutting the cord.

Moving from pay-TV to over-the-top (OTT) streaming content has garnered lots of attention over the past few years. Advertisers and programmers especially are struggling with how to reach audiences after they move from television to streaming. According to some numbers released earlier this year, pay-TV is experiencing a 0.5 percent year-over-year decline¹ so the concern appears warranted (though the numbers seem a little inflated given that DIRECTV itself lost 134,000 in the first quarter).

But what are Millennials thinking and doing in regard to the pilgrimage toward streaming? Obviously, they are the ones behind this cord-cutting frenzy. Not so fast. Research conducted in April 2014² indicates that cable still has a place with Millennials. According to this research, 42 percent of Millennials are always or usually watching television programming through cable service providers and 35 percent are doing it through an app, service or streaming device. And 24 percent are equally doing both (See Figure 1).

1 Cord-cutting accelerates in first three months of 2015, USA Today, Mike Snyder, May 2015

2 How Are Millennials Watching Television Programming, Invoke, April 2014

Figure 1: How Are Millennials Watching Television Programming (%) (n=106)

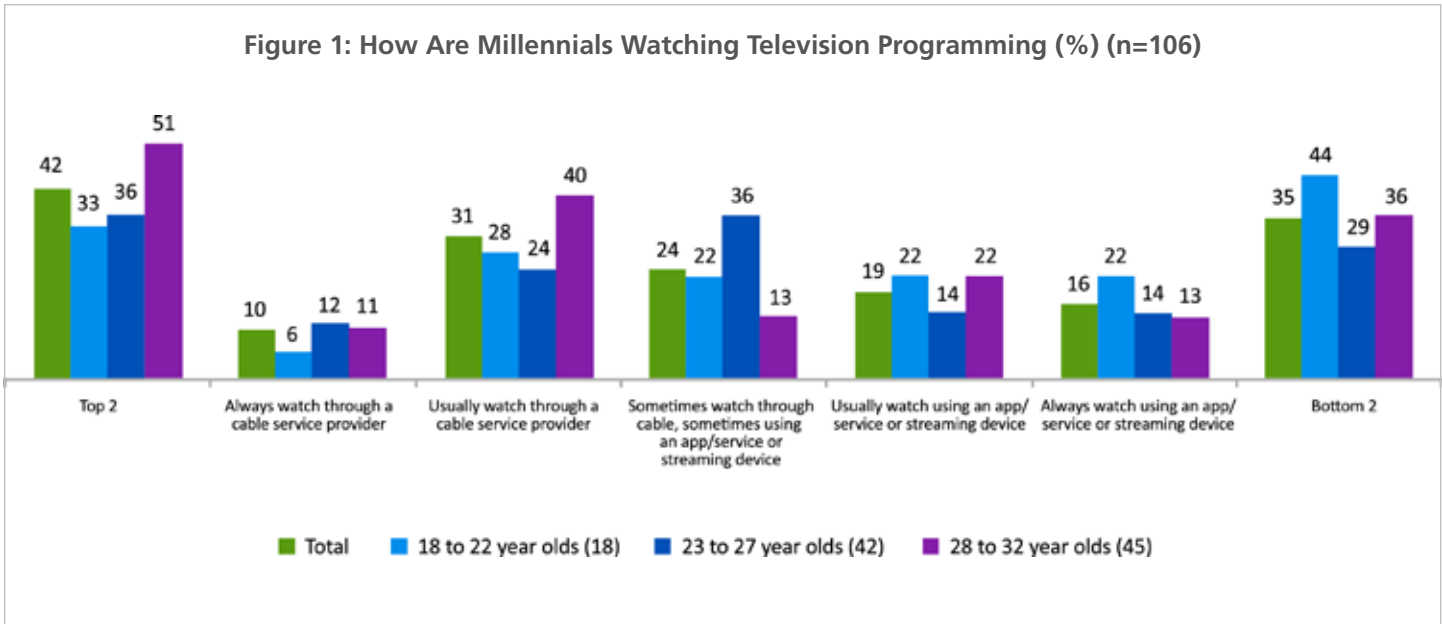


Figure 2: Cable vs. Streaming – Millennial Preference (%) (n=106)

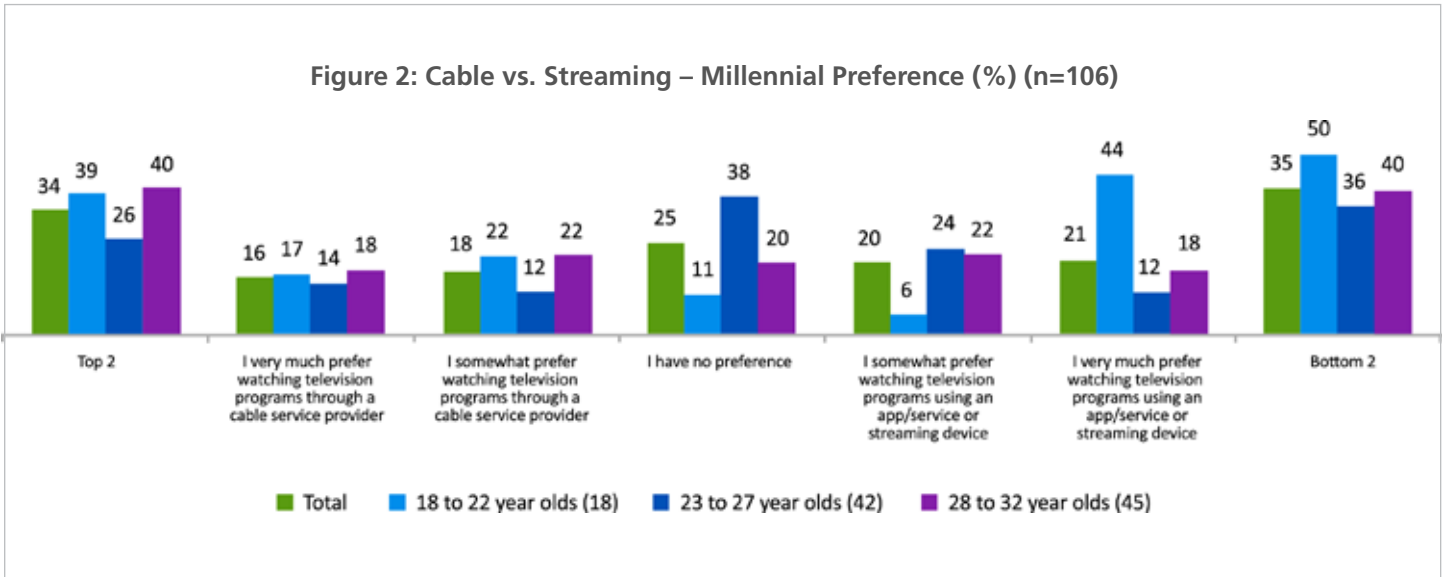


Figure 3: Millennial preference: Online vs. Brick-and-Mortar (n=99)

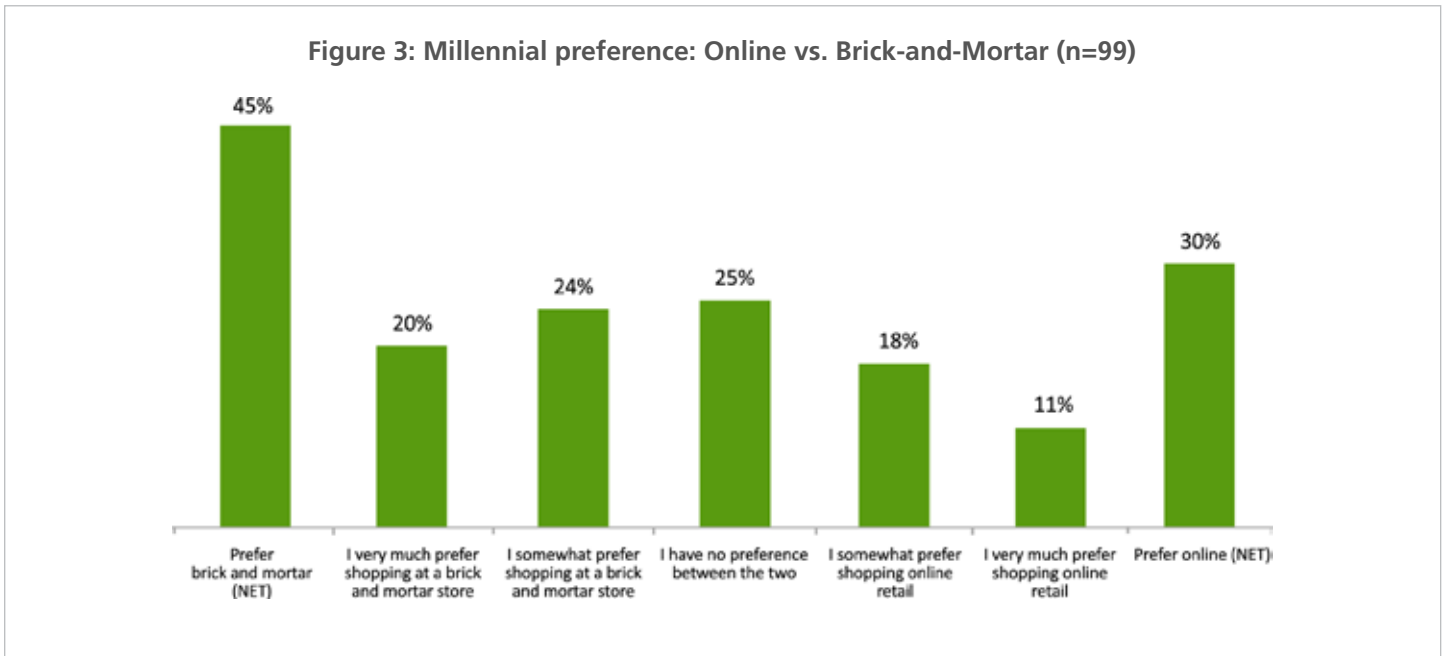
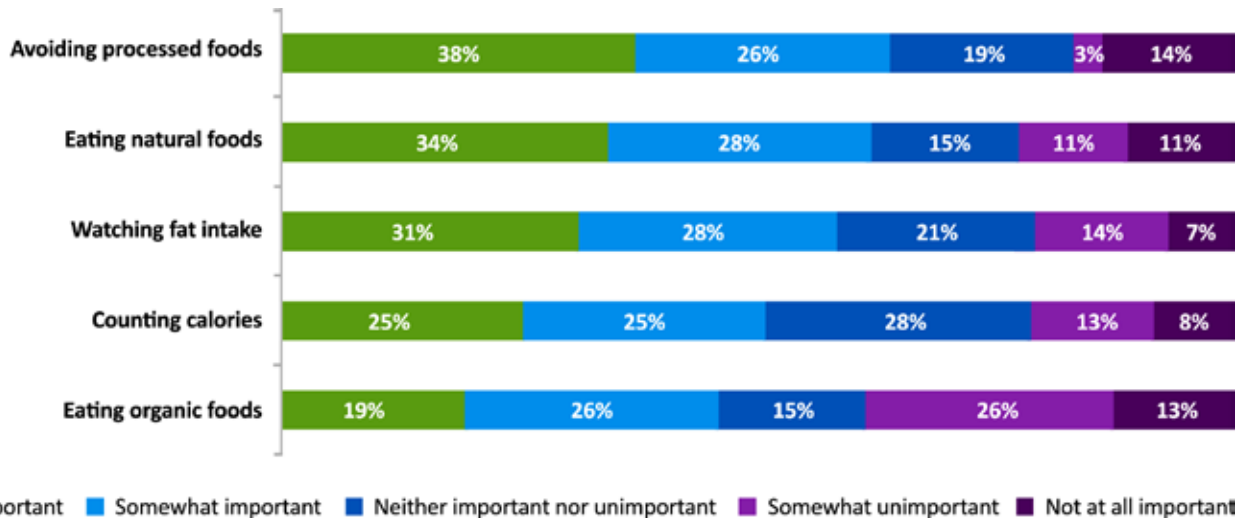


Figure 4: Importance of Dietary Habits for Millennials (n=72)



This relatively slow adoption is due to limited availability of streaming options or to economic factors, right? Further data shows that viewer preference levels remain split among Millennials whereby 41 percent prefer watching television programming via a streaming provider versus 34 percent who prefer a cable service provider, with younger Millennials showing the highest percentage of streaming preference (Figure 2, previous page).

That same research also gives us insight into why so many Millennials remain tied to their cable service provider. While streaming does give them more flexibility, lower prices and fewer commercials, Millennials *do* often like the ease of watching and or the more current programming pay-TV offers. Additionally, live programming (such as sports) is often something Millennials choose to watch through cable.

Busted myth #1: While cord cutting is increasing, Millennials remain largely tied to cable going forward, at least until streaming increases their “current episodes” content and/or starts streaming more live content, such as sporting events.

Millennial Myth #2: Millennials want to do all their shopping online.

We all know that e-commerce is increasingly prevalent. According to the U.S. Census Bureau, online retail e-commerce sales reached \$80.3 billion for the first quarter of 2015 (an increase from \$70.1 billion in Q1 of 2014). Some research and anecdotal evidence indicates that Millennials are driving the push toward online shopping and thus predicts a shift

away from traditional brick-and-mortar shopping among this important segment.

We conducted a multi-faceted study among 18–34 year olds in October 2014 that coupled a live, real-time usability research event with a mobile, in-the-moment survey to provide a more holistic view of Millennial preferences toward online versus brick-and-mortar shopping. During the live session, respondents were asked some general questions about their shopping habits and preferences. They were also asked to visit a popular retail website and undertake a simulated shopping exercise. A mobile survey was conducted while shoppers visited a brick-and-mortar version of the online store so that meaningful channel comparisons could be made.

When Millennials were asked a general likability question, 93 percent said that they enjoy shopping online whereas 76 percent like shopping at brick-and-mortar retail locations (top 2 box, n=99). And, when asked about change in frequency, 79 percent said that they are shopping online more often than they were a year ago compared to 33 percent that note the same increase in brick-and-mortar shopping (top 2 box, n=99). This means that Millennials are largely moving away from brick-and-mortar and fully embracing online shopping. Or does it?

When asked about past week behavior more directly, 62 percent said they had shopped online but 78 percent said they had shopped at brick-and-mortar locations. After Millennial respondents completed their shopping activities either online or in a physical store, they were asked general likability and ease-of-shopping questions. In both cases, brick-and-mortar won with

93 percent saying they liked the experience and 91 percent finding it easy (top 2 box, n=99). Conversely, 71 percent liked their online shopping experience and 82 percent found it easy (top 2 box, n=99).

If that didn’t tell an interesting story already, they were also asked a direct preference question – online versus brick-and-mortar. And 45 percent of these Millennials prefer brick-and-mortar shopping to online while 30 percent prefer online (Figure 3, previous page)

This is not to say that Millennials aren’t shopping online. Let’s not be ridiculous. Often, Millennials do like the lower prices and convenience offered with online, but brick-and-mortar offers them a more “tangible” shopping experience. They can interact with items, see them with their own eyes, try on clothes, etc.

“I like being able to view and touch things to be able to judge quality in person. No surprises that way.”

Busted myth #2: While online does offer them lower prices, deals and convenience, Millennials do still see value in the tangible experience of shopping brick-and-mortar.

Millennial Myth #3: Millennials are the healthiest...ever!

Much of the rhetoric surrounding the Millennial generation is focused on their healthy lifestyles. We assume they have more access to information about healthy foods and that they participate in more physical activities. I mean, they’re flooding Instagram and Facebook with photos of the foods they eat, so they must be healthy. Wrong! In fact, research proves the proportion of young adults with obesity has

tripled since 1974. On top of that, roughly 67 percent of Millennials do not engage in regular physical activity, nearly 33 percent smoke cigarettes and approximately 33 percent use illegal substances.³

So fine, another myth busted... but why? Why are Millennials, despite all the advances in healthcare and the appearance of a health focus, not as healthy as we all think? This was what spurred the latest in our series of research on Millennials. Through a live, large-scale focus group with 72 Millennials, we explored Millennials' perceptions and behaviors regarding health and wellness through a blend of open- and closed-ended questions.

It is true that Millennials claim to care about health and wellness. And they do take some action to try to live a healthier lifestyle. Many try to participate in physical activity when they can and try to eat healthy – often to look good, but also to obtain higher order benefits. One respondent explained their motivation to be healthy, saying, “Because the healthier I am, the more likely I am to achieve my goals and provide a better life for me and my family.” But many do admit to indulging in unhealthy food consumption such as chips and fast food because of the enjoyment they get from the experience. Time and money are also mentioned as hurdles to living a healthy lifestyle, especially for those starting families.

“Eating junk food like candy and chips but they taste soooooo good!!!”

“Between work and a new baby, all the regular household stuff like laundry, dishes, cleaning, there just aren't enough hours in the day. If I have the choice of playing with my son or doing a workout video, my son wins out every time.”

Notably, the way Millennials define health may not line up with traditional definitions laid down by other generations. When it comes to a healthy diet, Millennials place greater importance on the type of food they are eating (fresh produce, lean proteins) rather than the amount of calories they consume. Nearly 50 percent do not believe that counting calories has any impact on their overall health. And, as has been proven (but is perhaps currently out of vogue), counting calories does matter, especially when it comes to weight management. According to the CDC, balancing the number of calories you consume with the number of calories your body uses is key to achieving and maintaining a healthy weight.⁴

3 Health, United States, 2008, with a special feature on the Health of Young Adults., CDC, NCHS

4 Healthy Weight – It's not a diet, it's a lifestyle! CDC

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Busted myth #3: The assumption, based on perception and good intentions, is that Millennials are healthier than other generations. The reality is that, based on factors such as time, money and difference in focus compared to earlier generations, they are not as healthy as we think they are.

I think that, in the haste to understand and bucket Millennials, assumptions have been made based on the environment that surrounds them rather than the realities that face them. However, as they are now entering life stages very important to marketers (starting families, entering the workforce, etc.), it is important that we look at them

carefully, using both quantitative and qualitative data, to more fully understand who they are, what is important to them and how they can be reached.

In conclusion, remember when you thought you knew very little about Millennials? You probably know even less than you thought. You're welcome. ▼

Wayne Goodreau is vice president of research and insights at Invoke in Waltham, MA. His expertise spans over 15 years and across a number of vertical industries, including consumer packaged goods, information technology, insurance and financial services, and pharmaceuticals.

Establishing Search Opportunities and Potential in Your Market

By Kirsty Tanner



I recently wrote a white paper on *How Asia-Pacific Consumers Search for Cruises*¹ and the potential for the online cruise market. Certain factors stood out with regard to established search opportunities and potential for growth in any industry.

After having seen a steady incline in the number of searches for “cruise” throughout the Asia-Pacific, we explored the online cruise market to gain key insights into the industry. Much of what we found, however, can be applied to any market with an online presence. We took a look at global events to analyze their impact on

While the cruise industry is particularly susceptible to a range of external factors...every industry is susceptible to its own range of events, whether welcome or problematic

the market and examined the year-on-year trends and the “cruise” search forecast throughout the region. We determined what Asia-Pacific consumers are searching for within the confines of the cruise industry and examined demographics and linguistics, which might help you to better understand your own target audience.

Specifically, we closely studied the niche markets within the industry and analyzed the big brand names in the space; this helps companies to get a feel for their competitors, and learn from, and ultimately, outperform them. We also inspected people’s preferred devices and explored seasonal trends, identifying the best possible time for companies to plan and launch their next campaign.

Here, we’ve included some helpful tips for your own search analysis.

Year on Year Trends

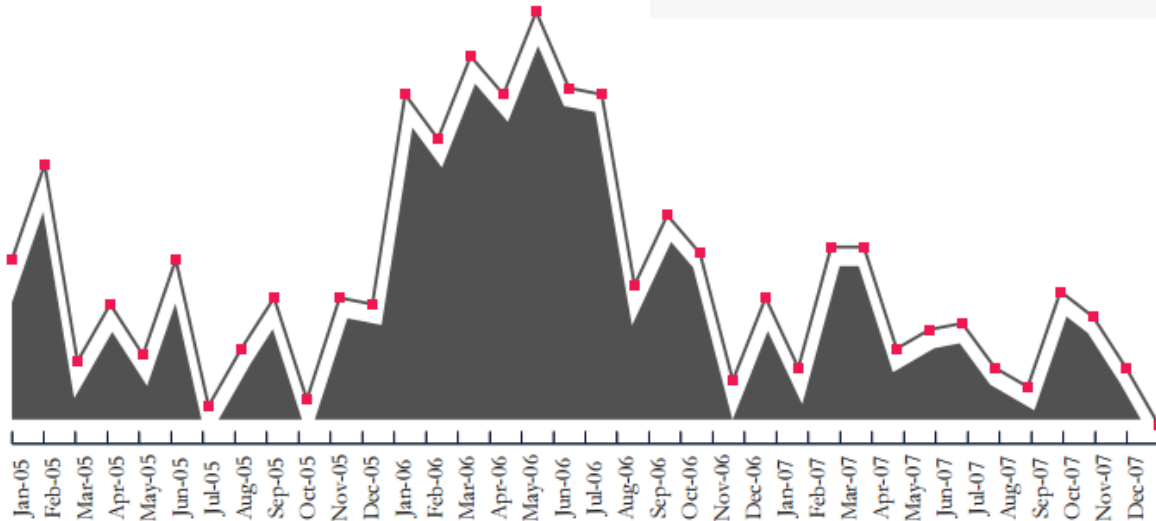
When conducting your own search forecast, it’s a good idea to go back and take a look at not only the current trends and future search potential for your industry, but to also look at the past. For example, while APAC searches for “cruise” relating to travel have gradually

¹ www.inmarketingwetrust.com.au/apac-cruise-seo-sem-whitepaper/?utm_source=whitepaper&utm_medium=email&utm_campaign=whitepaper&utm_term=cruises

Chinese Economy Grows 10.7% in 2006



The Chinese economy has also clearly impacted searches for 'cruise' relating to travel in China. As the Chinese economy grows so too do searches for 'cruise' by Chinese consumers.



been increasing, there was a drop in the market in 2011. With any unexpected rise or fall in search trends, it's a good idea to examine what has impacted the market and search trends within this timeframe to better understand your search potential.

Global Events

Global events often shape our markets as a whole but can also heavily affect search trends, e.g., we know that traditionally, cruise lines have planned 2-3 years in advance and published itineraries 18-24 months in advance. Certain events, however, prompted the industry to reconsider this, reviewing their planned deployments and even going so far as to move ships to regions less impacted by these events.

For example, when cruise lines became aware that the Australian economy had not gone into recession following the global financial crisis like many of America's source markets had, several ships were moved to the country on a full-year or seasonal basis.

While the cruise industry is particularly susceptible to a range of external factors (including the economy, climate and security), every industry is susceptible to

its own range of events, whether welcome or problematic.

On January 13, 2012, the Costa Concordia plummeted and so too did searches for "cruise." While some of this drop may be attributed to seasonal trends in the market, such a heavy drop cannot be accounted for by that one trend alone. In contrast, while global events can harm an online marketplace, it's encouraging to note that certain events can also give a significant boost to the market. For example, in 2006, as the Chinese economy grew substantially to 10.7 percent, so too did searches for "cruise" relating to travel by Chinese consumers.

By knowing and understanding your competition, you can learn from them, observe their tactics and ultimately, outgrow them

Top Destinations

By understanding which areas consumers are most interested in, you are better able to target your product offerings, marketing campaigns and website optimization. While generic searches almost always dominate, it

is common for consumers to add a specific location to their search. It's important to conduct search analysis and discover not only where your searchers are coming from, but also the destination they're adding to their search.

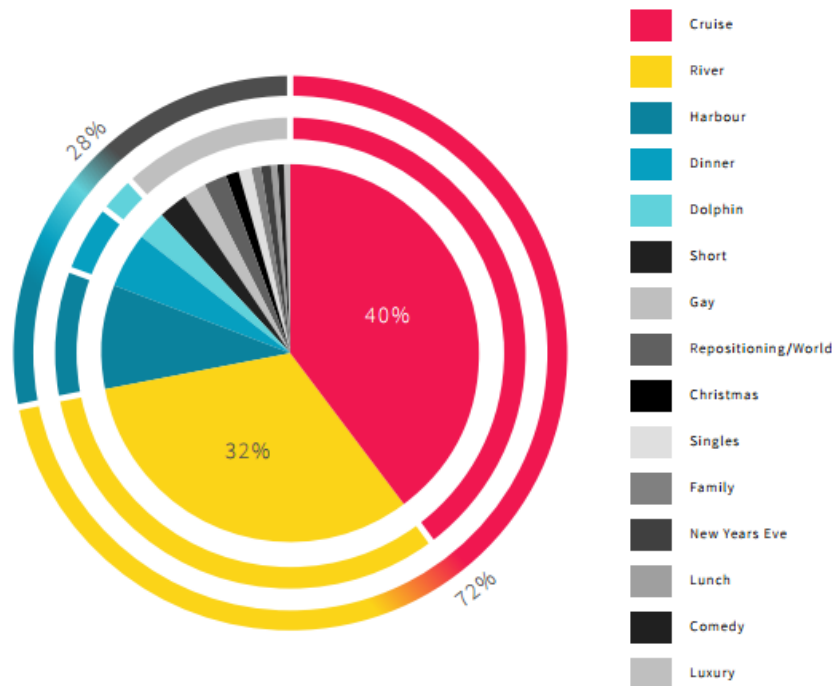
The top destinations are often not what's imagined. When conducting our research into the most searched-for destinations by Asia-Pacific cruisers, the number one destination was Sydney, with Australia clearly dominating the whole APAC market. This finding turned out to be surprising, considering the ratio of Australian travellers in the market segment.

Niche Markets

Segmenting the market is important in order to understand, better target and serve potential customers. It also opens up a better way to filter your audience and promote engagement while creating more valuable online content.

Not only should you conduct search analysis into different niche markets in order to better serve potential customers, you should also pursue opportunities to educate your customers on what products and services are available to them. For example, when conducting niche research in the online cruise space, we found that generic

Top 15 Niche Markets



“cruise” searches made up approximately 40 percent of searches by Asia-Pacific consumers, with generic “river cruises” making up 32 percent. This result shows not only that the vast majority of Asia-Pacific consumers aren’t sure exactly what type of cruise they are looking for, but also that they are unaware of what types of cruises are available to them.

King of Competition

Determining where you’re placed in the market and understanding the competition is important in order to compete, optimize your website and grow your customer base. By knowing and understanding the competition, you can learn from them, observe their tactics and, ultimately, outgrow them.

It’s interesting to note that branded search volumes for “cruise” relating to travel in the Asia-Pacific is again dominated by the Australian market, which corresponds directly with the top location search terms. This also further indicates a trend toward domestic cruises.

Branded search terms do not always correlate with the largest and best-ranking websites, indicating that there is room for smaller brands to enter the market through exceptional advertising, whether that be through online, television, print form, etc.

Branded search terms do not always correlate with the largest and best-ranking websites, indicating that there is room for smaller brands to enter the market through exceptional advertising



For example, while MSC have almost doubled the amount of natural inbound links of the second best-performing cruise website, Carnival, they only just scrape into the top 10 branded search terms. So while their website arguably provides the most engaging information and resources, consumers don’t necessarily think of them first when conducting branded searches.

Demographics

Obviously, understanding the demographics of your potential customers is important to better target your market, online messages and content. But understanding what consumers search for is also important in optimizing your services and products. For example, as many Asian guests have limited vacation entitlements, they are mostly selecting short duration cruises, which can be clearly seen in search data with 57 percent of cruisers searching for shorter cruise durations.

This search trend has penetrated the market with cruise lines offering more short term cruises. Carnival Cruises, launched 133 cruises for 2016–2017 with an increase in short breaks at sea, including seven weekend getaways.

Your entire target audience may not always directly correspond with the people

China's Seasonal Trends

We chose the 3 largest countries in the Asia-Pacific, each from South Asia, East Asia and the Pacific to distinguish the differences in seasonal trends throughout the Asia-Pacific.



searching for your products and services. According to the *2015 Cruise Industry Outlook*,² the average global cruiser is 49 years old while the vast majority of those searching for cruises online are well below that age; 14 percent are 35–44, 22 percent are 25–35, 19 percent are 18–24 and the remaining 26 percent are unknown, leaving only 19 percent being aged 45 or older.

Linguistics

Gaining a better understanding of the language and phrasing consumers use when searching is essential when wanting to rank highly in search results. By matching the language, keywords and phrasing on your website with the language your target audience uses when searching, you are far more likely to rank well for those same queries.

Like many markets, Asia-Pacific cruisers are most often searching for a good deal.

Devices

While mobile search is now a huge player and searches made via mobile and tablet are growing within most every market, searches for “cruise” by Asia-Pacific consumers are still primarily made via

desktop, with a total average of just 37 percent of searches for “cruise” conducted on mobile devices over the last 12 months (and tablet searches making up just 6 percent).

This is a trend seen in most markets. It's also important to take a look at the difference between the initial search and the last search before purchase because, often, mobile searches are conducted for initial research purposes but not used as heavily to make final purchases.

Launching Your Campaign

Understanding seasonal trends in the online market can help to better plan activity and prepare for launching your next campaign. Knowing when your target audience is conducting the most searches helps to plan and push your campaigns, content and online and offline messaging.

Using search volume data for the keyword “cruise” relating to travel throughout the Asia-Pacific, we were able to determine seasonal activity, calculated by the average number of monthly searches over the past 10 years. As expected, seasonal search activity varied greatly from country to country.

Tips for Conducting Your Own Search Analysis

In order to gain better insight into your industry and analyze search patterns, keyword, trend and competitor data should be collected using a combination of sources, thoroughly analyzing the collected information to identify key categories and a more comprehensive understanding of your online market.

Search volumes should be analyzed in order to discover and explore key categories within the industry and to develop a better understanding of niche markets within the sector. Competitors should be ranked by their performance in natural search for the online market as a whole.

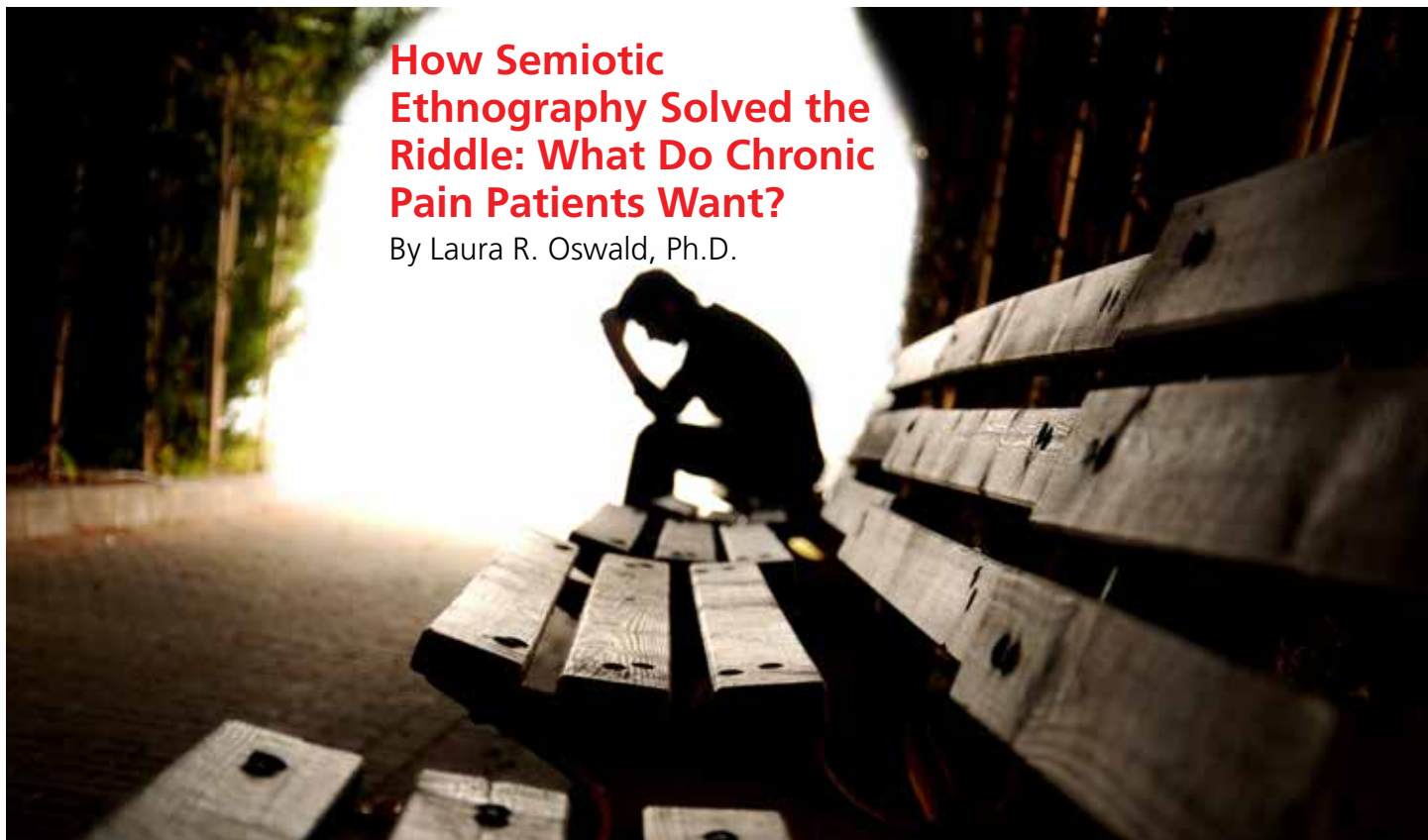
Key events, seasonality and platform trends should all be examined to identify patterns and to gain insight into the industry. Analysis of the keyword data set should be undertaken to develop a linguistic report of the market and to further understand the language your audience uses when they perform a search. ▼

Kirsty Tanner is a digital marketer and content producer for In Marketing We Trust in Australia.

² By the Cruise Lines International Association (CLIA) www.cruising.org/about-the-industry/press-room/research

How Semiotic Ethnography Solved the Riddle: What Do Chronic Pain Patients Want?

By Laura R. Oswald, Ph.D.



Behavioral economists agree that market value is based not only on the vicissitudes of financial markets, but in a system of symbolic exchange which trades on the meanings that consumers attach to goods. If we agree that value creation is entwined with meaning production, then managing brand equity is tantamount to managing brand semiotics (Oswald 2012, 2015). In this article, I discuss the advantages of semiotic research methods for decoding consumer experiences and translating them into marketing strategy.

I focus specifically on the innovative research techniques we used to decode the meaning of chronic pain for patients, one of the most elusive areas of consumer behavior. Pain research poses unique research challenges because patients have trouble verbalizing what they actually feel. The case illustrates the advantages of semiotic ethnography and metaphor elicitation to decode the nonverbal discourses consumers use to describe their pain experiences. Findings led to a new understanding of chronic pain based not so much on its effects on the body as on consumers' lifestyles and goals.

What is Semiotic Ethnography?

Semiotic ethnography accounts for tensions between the codes that structure cultural norms and the messy, unpredictable nature of human behavior. On the one hand,

If we agree that value creation is entwined with meaning production, then managing brand equity is tantamount to managing brand semiotics

semiotics brings a degree of objectivity and science to ethnographic research inasmuch as it is rooted in linguistic science and the theory of codes. It draws from Levi-Strauss's ([1963] 1974) famous structural approach to culture, which exposes the underlying code system structuring the meaning of goods and consumer experiences in field sites. Semiotic ethnography accounts for the multiple code systems at play in the ethnographic situation, including consumer speech as well as nonverbal signs such as designs, consumer rituals, social interactions, and the disposition of goods in the lived environment. Because semiotic ethnography seizes consumer behavior in action, it also exposes the unique ways that consumers perform these codes in everyday practice.

Research Design

Two-hour ethnographic interviews were conducted in the homes of 24 men and women, ranging in age from 35 to 65

and spread over three U.S. markets. All respondents had been suffering from chronic pain for one to ten years and were looking for alternatives to the pharmaceuticals and over-the-counter pain medications they were currently using.

Semiotic ethnography was used because it provides access to an array of nonverbal codes in the home environment that reflect consumers' lifestyles, mood states and social life. We also introduced an unorthodox methodology to the ethnographic toolkit by using projective tasks that invited consumers to associate their experiences of pain with nonverbal symbols. This two-pronged methodology exposed parallels between consumers' psychological projections and the semiotic analysis of their domestic space.

The Semiotics of Pain

Early in the interview, respondents were exposed to projective exercises that prompted them to associate visual symbols and designs with their experiences of both pain and pain relief. The visual stimuli consisted of two-dozen abstract paintings by modern artists such as Appel, O'Keefe, Picasso, Mondrian, Kandinsky, Pollack and Delaney where the emphasis is on form and emotion rather than on the characters, stories and landscapes of figurative painting. Respondents chose the top two images that best represented pain and pain relief

in terms of visual elements such as color or shape. Even though none of the respondents met each other and even though they were chosen from the phone book rather than from a database, there was a high degree of consensus in their image choices. In fact, the symbolism they associated with pain developed into a kind of shared code system.

Over the course of each interview, consumers learned to associate a certain sensation of pain with specific colors and designs in the images. Over the course of 24 interviews, there emerged a high degree of agreement about the association of pain sensations with specific symbols and colors in the images. For example, blue stands for the self, red stands for intensity, jagged lines represent the jabbing, pulsing sensations of pain and squiggly lines stand for chaos. Pain relief softened the red to pink, smoothed out the jagged lines and brought order to one's life. Respondents eventually stopped using words like "pain" or "heat" and used these symbols to communicate instead. Over time, a kind of "pain lexicon" emerged that enabled researchers and respondents to communicate about pain sensations by means of these nonverbal symbols.

Consumers most frequently associated two paintings with pain: Appel's *Angry Landscape*¹ (1967) and Delaney's *Untitled*² (1954). A semiotic analysis of the two images suggests that pain's effects on the patient's spirit and lifestyle outweigh its physical sensation. Consumers chose *Angry Landscape* (1967) because the jagged lines and haphazard movement of red, yellow and orange against the black³ background resemble the chaos and disorder that pain has introduced into their lives. The eerie figures suggest the threatening, dark mood brought about by pain. And the streak of yellow moving on a diagonal from top to bottom represent pain's heat and intensity. Respondents associated blue with the cooling, stabilizing state of the Self without pain. The patch of blue in the Appel painting suggests a reduced Self that is subordinated to the overall violence and chaos produced by pain. Consumers chose the Delaney picture because the irregular squiggly lines communicate the chaos and lack of control caused by pain. The blue shadow behind the lines represents the diminished Self, overwhelmed by the chaos of pain.

1 home.manhattan.edu/arts/gallery/picture.php?cat=28&image_id=3681

2 manufactoriel.tumblr.com/post/85990218832/untitled-raincoat-painting-1954-by-beauford

3 totallyhistory.com/white-center-yellow-pink-and-lavender-on-rose/



Figure 1. The Semiotics of Domestic Space

Because semiotic ethnography seizes consumer behavior in action, it also exposes the unique ways that consumers perform...in everyday practice

Pain Relief

Consumers reported that treatments never fully eliminate pain. They associate pain relief with visuals that soften the intensity and heat of the colors, smooth out the jagged lines and bring harmony to chaos. They also said that the color blue, a symbol for the Self in the pain lexicon, gets bigger, suggesting that pain relief represents an enhanced sense of control and personal integrity. They most frequently associated two paintings with pain relief: Georgia O'Keefe's *Music Pink and Blue, II*,⁴ (1918) and Mark Rothko's *White Center (Yellow, Pink and Lavender on Rose)* (1950).

The Semiotics of Domestic Space

A shared consumer discourse emerged from the picture sort exercise that emphasized the effects of chronic pain on consumers' emotions, social lives and life projects. This message was also reiterated in the semiotics of consumers' lived environments because life with chronic pain dramatically alters consumers' ability to keep house, complete projects, organize their possessions and even manage their pain treatments.

A dwelling is a kind of text that is organized by cultural codes for decorating and furnishing the home. Codes articulate the domestic space into binaries such as sacred versus profane and public versus private. Social norms shame us into keeping house and organizing our possessions

4 artblart.files.wordpress.com/2010/03/georgia-okeeffe-music-pink-and-blue-no-2-1918.jpg

in tidy cabinets and closets with adages such as "cleanliness is next to godliness." Although each individual interprets these codes according to personal tastes and lifestyles, cultural norms account for the fairly consistent arrangement of spaces, possessions and traffic flow within the home. For chronic pain sufferers, the home reflects the gradual decline of personal control over one's life as the pain continues. Hoarding discarded goods is the most obvious manifestation of their inner chaos.

In the early stages of chronic pain, consumers contain the chaos by storing discarded goods in closets or extra bedrooms. In the advanced stages of pain, discarded clothing, junk and boxes gradually extend from the private areas of the home into the public spaces. The mess fills up hallways and bedrooms and crowds the living room. Even the kitchen is piled high with dirty dishes, pans and refuse. [Figure 1.]

At one home, the respondent told researchers to enter by the back door because piles of discarded newspapers and Christmas decorations blocked the front door entrance. In these kinds of households, researchers had to remove junk from chairs and sofas in order to find space to sit down for the interview. Even respondents' beds were piled high with clothing and papers, leaving only a small space for the individual to sleep. The goods in these homes seemed to possess the people rather than the other way around. As the chaos takes over their homes, consumers increasingly dissociate themselves from their surroundings, frozen in a state of mental denial about the dysfunctional state of their environments. In one household, a young teenager arrived home from school and dodged stacks of hoarded goods when he went upstairs as if habit had desensitized him to the environment. Patients and family members alike seemed frozen in a state of mental denial about their dysfunctional homes.

Consumers living with long-term chronic

pain also collapse boundaries between sacred and profane areas of the home that traditionally define where one stores prescription drugs. Rather than storing their medications in special cupboards and cabinets in the private areas of the home, patients would leave them in public areas such as the living room and kitchen, on coffee tables, kitchen counters and bookcases. Pain treatment consumed their daily lives. Over time, patients often lost control of their medication use, leading some to addictive behaviors such as taking double and triple the recommended dose of over-the-counter medications such as ibuprofen.

Implications for Qualitative Research

Projective tasks are designed to elicit information about consumers' deep emotional and mental states whereas ethnography traditionally focuses on the social and cultural factors associated with consumer behavior. By embedding the picture sort exercise within the ethnographic interview and observation of patients in their homes, the study exposed the paradigmatic implication of the physical, emotional and lifestyle effects of pain on consumers' lives.

A shared consumer discourse emerged... that emphasized the effects of chronic pain on consumers' emotions, social lives and life projects

The two-pronged approach illustrates the reliability and objectivity of semiotics-based research. Rather than relying upon researchers' subjective interpretations, semiotics methods draw inferences about consumers based upon the iterability of findings on more than one level of consumer experience. From the psychological projections to the semiotics of the lived environment, consumers reiterated – nonverbally – that the most troubling effect of pain was the chaos and lack of control it introduced into their mental states, their lifestyles and their environment. Researchers discovered that “what chronic pain patients want” is a restored sense of order and purpose in their lives.

The multi-dimensional design of the research also bridged the gap between consumer insights, marketing strategy and

advertising. Findings inspired ideas for new pain treatment products and pharmaceutical brand positioning. Furthermore, by linking the experience of pain to visual symbolism, the picture sort exercise provided insights for developing marketing communication strategies. ▼

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Marketers: Customers Are Not the Walking Dead!

By Mike Berendes

Even if you are not a fan of the AMC program “The Walking Dead,” you are no doubt familiar with the concept of zombies: those mindless, terrifying creatures coming to “get” you. But have you ever stopped to wonder why zombies seem to be so popular in our culture these days? TV shows, movies, songs, even candy – zombies are everywhere. Why? In this era of social media, Big Data and interconnected technology, maybe it has something to do with the human connection we seem to have lost to each other.



Loss is certainly a key plot element of the show; only a few original cast members remain from when the series began. But there is also great symbolism in the popular binge-watch-inducing program. In the desolate wasteland that used to be the USA, all humanity has been left to rely on their most basic human traits: empathy for others, love of friends and family, protection of innocent life, honesty to others and self and the integrity to walk the talk. Arguably, one of the main drivers of the show’s success is the chance for audience members to embrace their human side as a respite from our technology-dependent world. After all, it’s *humanity* that wins the day.

For those industries with brick-and-mortar presence, there is a great lesson here: *To survive, you need to embrace your humanity.*

Let me explain. Next time you are at your favorite store, take a look around. Not at the slick signage, the plethora of “all new” products or even the carefully staged lighting. Look at the people. Do they appear to behave in the same manner or are there differences? Look carefully. Are their motivations the same? Probably not.

Yes, they all came with the intention of purchasing something, but for whom? For what occasion? With what budget? They have *the store* in common, but they are otherwise different. And they are *not* just their income level, race, religion or gender. They are living, breathing, thinking people with money to spend. Will they spend it on brand “x” or “y”?

I’ve always had a love of retail. Be it grocery, mass, drug or club, I’ve always enjoyed watching marketing teams battle it out, each vying for hard-earned dollars. But in the last few years, in the wake of Big Data, marketers have begun to dive a bit too far down the data-trail, to the point of forgetting their customers’ humanity. Yes, we each fit into age, gender, income, education and life experience buckets, but we are much more than that....aren’t we?

We are more than our demographics!
Two different people, but the demo is the same.



Ozzy Osbourne



Prince Charles

- Male
- Born in 1948
- Grew up in England
- Married Twice
- Two Children
- Very Wealthy
- Real Estate Owner
- Spend Winter Vacations in the Alps
- Like Dogs

Each person is the collection of their life experience and choices up to this point. But before you start thinking that this perspective leaves too many variables, let's start with what we know: ourselves.

When you got in the car, you had a specific intent when coming to the store. You had a general idea of what you wanted to purchase, if not the precise item (down to shirt style or ounce size). You safely drove to the store and entered the building. You sifted through all the shopper-marketing hype (will changing my toothpaste really change my entire outlook on life?), found what you were looking for, and then made it to checkout to pay for your items. Are you prepared to say that you were not aware during that time? That you just responded to whatever stimulus presented itself on your shopping trip? Are you a braindead consumer, idling waiting for some marketer's "winning strategy" to draw you toward their product or service? No? Then neither are your consumers.

Consumers in the United States have been underrated by far too many marketers for far too long. They are commonly judged to be "stupid" when 75 percent are at least high-school educated, if not college-educated. They are thought to navigate via in-store signage when research conducted by Forrester Research in 2014 has proven that 79 percent of shoppers feel in-store communications do not apply to them. They are told they are "valuable customers" when 50 percent of Americans feel their favorite brands aren't interested in their thoughts for improvement.¹ What would happen if a company unlocked the real feedback from their customers and applied it to their business for the better? In short, loyalty and sales come to those companies who openly listen and consider their customers' feedback.

But let's get back to your fellow shoppers. Pay close attention. You'll notice them navigating the different areas of the store, looking for what they want, checking their list, considering options and making selections. Your consumers are *thinking!* But what are they thinking about?

Let's consult the data and "dive deep" into expensive multi-variable regression analysis tying up people and resources for three-quarters of the year to come up with an algorithm that spits out a list of potential things that could be going on in the contrived profile of the consumer's mind...

...Or we could just – gasp – talk to them. Shoppers consider their purchases, just

like you do. They look for the best deal, the best fit, the best value for their hard-earned dollar. These are *not* mindless automatons just wandering the store. They are shoppers with a story to tell...if only someone was there to listen.

[Consumers] are *not* just their income level, race, religion or gender. They are living, breathing, thinking people with money to spend.

In "The Walking Dead," the small band of survivors struggle with losing their humanity in the wake of a zombie apocalypse. From family, friends, lovers and neighbors, each human connection is tested in the show. What inevitably wins the day each episode is some measure of connecting with the person beyond the peril, somehow leveraging ingenuity and the human spirit to get out alive. The trick to survival is to not lose your humanity. And that has a familiar ring.

Yes, we each fit into age, gender, income, education and life experience buckets, but we are much more than that....aren't we?

Now, retail is hardly a life or death situation, but the stakes are high and the human element of the process must be taken into account. Things like ingenuity and the human spirit are not found in number-crunching; they are found with the customer. They are found through a real, human connection and conversation. In short, the best data isn't data at all.

If you are feeling brave, walk up to a fellow shopper and ask them why they decided to shop at the store you have in common. They might say "I don't know" at first, but with a little conversation, the truth will come out. Wouldn't it be great if the owners of the store knew what customers liked or didn't like about shopping there? Wouldn't it be great if they knew what they

needed to change? Or what *not* to change?

We must first realize the truth that people frequenting a store know why they are there. Then we must have the courage to ask, "What could be done better?" and mean it. In a world where so many are discounting the consumer, the one who chooses to learn from the people behind the demographics will find what all marketers dream about: loyalty, frequency and thereby higher sales.

There is so much technology surrounding us and, often, we feel we can't live without it. However, what we really can't live without...is each other. Every time we interact with the world, we see how people need people. When we set our alarm clocks, sleep in our beds, brush our teeth, eat our breakfast, drive our cars, work at our computers, buy groceries or prepare meals for our families, we're relying on people every moment. Just try to make your own alarm clock, fashion a toothbrush, raise farm animals, build an automobile or computer or raise all the food you need. We literally *depend* on each other to survive, much more than we could ever depend on the Internet, phones or computers. Why would your business be any different?

Yes, it can be tough to quantify customer opinions and feedback to allow business decision-making that focuses on driving loyal customers, but that is exactly why it must be done. Those who learn how to nurture and leverage their customer relationships will thrive in the current marketplace. But it's a true embrace of humanity, not slick email campaigns and slogans. It must be real to cut through the clutter and engage with people desperate for a real connection in a virtual world.

Marketing research needs to find better ways to listen to their audience, not just speak *to* them. The opportunity gap is plain to see for those inclined to see it. But for those who fill the engagement gap, the loyalty achieved will be ample, genuine and thereby sustainable. ▽

Mike Berendes is director of marketing and business development at Custom Intercept Solutions. Previous positions at Activision Gaming, Energizer Battery, Kraft Foods and Novus Print Media taught him a thing or two (or three!) about changing consumer preferences and the importance of engaging with potential buyers to stay ahead of data analysis-paralysis. Berendes holds a BA in International Marketing from St. John's University and an MBA in Marketing from the University St. Thomas.

¹ www.forrester.com/home/

How the Researcher Unlocks Mobile Research's Potential

By Christopher Correa



Similar to a 14-year-old who's just been gifted their first iPhone, the research industry is borderline obsessed with mobile devices.

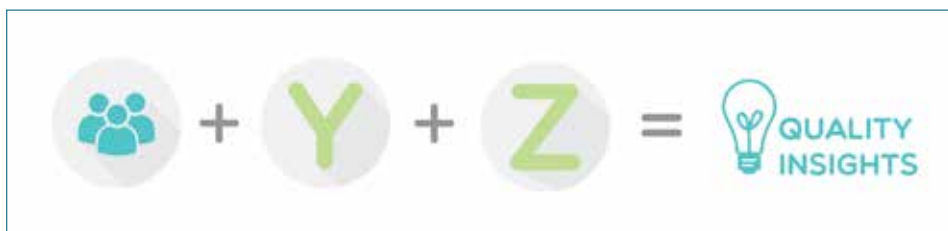
Wherever you look, mobile devices are being used to facilitate all manner of research. From in-the-moment surveys and in-home usage tests to shop-a-long studies, consumers are sharing their selfie insights on a variety of occasions. This mobile mania has coincided with the rise of a number of mobile research platforms and tools begging for the attention of the researcher. This mobile mania can leave a researcher's head spinning, dizzy from the options and wary of insights that can be achieved with the little glowing screens in consumers' pockets. Some researchers are rightfully skeptical of mobile research platforms.

Take the qualitative researcher who values the opportunity to sit face-to-face with her research subjects, for example. It makes sense that she would be skeptical of this one-on-one approach, especially when she's not sure how she – or her talents – fit into the mobile qualitative research equation. When we speak of the researcher's talents, we're speaking of the incredible amount of empathy she brings to the table when developing a discussion guide or speaking to her subject. The discussion guide isn't static; it's flexible. Like a great improviser, the researcher

goes into her session with the research participant and carefully hits the beats of her guide while seamlessly breaking off script to do a deeper dive on something the participant just said. That's where those surprising insights – those insights she makes a career from – are buried. How can that level of insight be achieved when you keep the researcher miles away from her participant?

Fear not! Not only are good qualitative insights achievable via mobile research, but the researcher and her empathetic talents are still the most important part of the equation. At their best, mobile research platforms simply allow – and require – the researcher to focus on the part of qualitative research equation that she is particularly gifted at, albeit in a different way. We'll get to that later. First, let's look at the equation for good qualitative research, an equation which doesn't change for mobile.

You find the right people. In the past, this integral part of the research process may have been the most cumbersome. The researcher develops a screener based on specific demographic / psychographic parameters, then goes forth into the great big world and carefully (read: painstakingly) finds qualified participants whom she will research. Now, this doesn't necessarily change with mobile research. The researcher is still going to develop a screener based on specific parameters. However, the part where they send email blasts, do cold calls and scour social media should be streamlined with the advent of mobile research platforms that include robust databases. And, let's be honest, most mobile research platforms have exactly that – a database with tens of thousands (if not hundreds of thousands) of participants all over the world ready to fill out a screener on a moment's notice. A recruit that could've taken weeks can now take hours, freeing the researcher's time.





The next part of the equation is putting the right people in the right context. Traditionally, this may be in a focus group, in the participant's home, or in a store for a shop-a-long. This requires planning. The researcher or their office-mate, Earl the project manager, carefully figures out what times the participants have free and when their availability matches with the researcher's schedule. Then, there's the business of the researcher or participants travelling to the agreed-upon site. It goes without saying that this is all very time-consuming and expensive, dollars piling up like San Franciscans in a Bart car. Yet, here's another area where mobile technology lessens the burden for the researcher and her intrepid office-mate Earl.

Once the database of qualified participants has completed the screener and the chosen few have been marked, the researcher can choose to put them in whatever context her imagination conjures up. (Okay, if your mind went to the ocean floor, then your imagination needs some reigning in). The beauty of mobile research is that you can access the consumer wherever they take their cell phone, which is pretty much everywhere (750 people in a 1,000 person study in 2012 admitted to using their phone on the john)¹. Context, in the case of mobile research, is no longer a scheduling nightmare. *Viva la revolucion!*

Onward to the final part of the qualitative research equation, the part where the researcher is required most in mobile research: asking the right questions. In the field, this comes in the form of a discussion guide. As discussed earlier, the researcher uses the discussion guide to facilitate a conversation with the research subjects. One-on-one, the researcher equips her

empathy cape to suss out areas the research subject feels strongly about. This part of the process is the ballet, the live theater part of the equation. This is where the researcher can feel like Beethoven conducting piano concerto number 5, waving empathy like a baton. Conversely, within the mobile research one-on-one context, the researcher is challenged to be proactively empathetic instead of employing empathy in a one-on-one context.

Mobile mania can leave a researcher's head spinning, dizzy from the options and wary of insights that can be achieved with the little glowing screens in consumer's pockets

Within a mobile research workflow, this proactive (or cognitive) empathy needs to be deployed during the question-writing process. Because the researcher will not be able to address the research subject while they answer the questions, the researcher is tasked with putting herself in the shoes of the participant while she writes the questions. In a one-on-one context, the researcher can adjust on the fly, pursuing a line of thought that may yield better insights than the prepared discussion guide. With mobile, when crafting her questions in the one-on-one context, the researcher needs to take the perspective of the participant. Every word, every clause, every sentence within each question is a chance to guide the participant into a thought process

that will elicit the strongest responses and insights (as well as being a chance for them to get off track). Often, we find that it's best practice to answer the questions you write for a mobile research platform from the perspective of the target demo. Where can the participant get off track? Where will they have an emotional response? What will engage them? These are questions that run through our head as we devise a set of questions for the mobile research platform we're most inclined to use. If you can utilize cognitive empathy during this part of the process, you will have devised a set of questions that thoughtfully guide the conversation with the research subject even though you're not in the room. The result? Those golden nuggets of insight that we got into the research game for.

The equation for good qualitative research doesn't change when we move to a new platform. However, mobile technology enables ease where there were once headaches (recruitment), flexibility where there was once rigidity (context) and requires cognitive empathy where a more improvisational approach was once the status quo (questions). Mobile research platforms should not aim to replace the researcher; they are simply a new tool for the researcher to reach for in their toolbox. With a shift in perspective, reach for this new tool with confidence and swing for the insights you and your client deserve. ▼

¹ www.11mark.com/IT-in-the-Toilet

Christopher Correa is a project manager and video producer at Mindswarms, a full-service mobile research platform with a global database of participants that specializes in mobile video ethnography.



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Key Mobile Advertising Performance: Real World Case Studies From a Mobile Analytics Company

By John Busby

In the mid-1990s, companies like Amazon put the “e” in e-commerce by bringing the brick and mortar shopping experience to the Internet. It’s not a coincidence that the resulting dot-com boom aligned perfectly with the rise of the personal computer. As the way we access technology changes, so do our expectations of how we connect with it.

Today, smartphones are as essential to American life as cars. As a result, we view the world through the lens of mobile. The mobile revolution has transformed how consumers buy products and services on their mobile phones. Virtually every purchase decision that a consumer makes today is influenced in some way by a mobile search.

As part of this shift in behavior, consumers are going back to the phone call to connect with businesses. Google has studied this phenomenon and found that consumers are actually more likely to make a phone call after a local mobile business search than any other purchase-oriented activity.

But how big is this really? In a recent study, Marchex and BIA/Kelsey forecasted that consumers will spend more than \$1 trillion on “click-to-call commerce” in 2015.¹ (Click-to-call commerce is defined as a consumer purchasing a product or making an appointment over the phone as the result of a mobile business search.) It may surprise you, but click-to-call commerce is triple the size of e-commerce!

There is, however, a big blind spot for marketers, who spend an estimated \$4 billion on mobile click-to-call ads on search engines. When a consumer jumps from the online world (a mobile search) to the real world (a phone call), marketers lack the visibility to make optimal budgeting decisions. Marketers generally know how many phone calls connected, but not whether those connected calls became customers.

Enter call analytics, part of the growing world of real world analytics. Call analytics tools change the game by giving businesses a peek behind the curtain to see what’s really going on. This has two key advantages:

First, it shows businesses how to optimize their campaigns to achieve the lowest

possible cost-per-sale (CPS). Call analytics can identify which calls are sales calls and then associate that data back to the keyword, impression or campaign that drove the sale. Marketers can experience up to a 50 percent greater return on an investment with this information.

Virtually every purchase decision that a consumer makes today is influenced in some way by a mobile search

Second, analytics show marketers how to focus on lead pipelines with the most potential for conversions. In a breakdown of calls from a national cable television advertiser in 2014, Marchex calculated that more than 80% of phone calls did not have purchase intent.² Businesses also field customer service calls, accidental calls and repeat phone calls. By building campaigns around keywords that trigger the most calls with purchase intent, marketers can cut down on ad spending while optimizing results.

By building campaigns around keywords that trigger the most calls with purchase intent, marketers can cut down on ad spending while optimizing results

The difference it makes to your bottom line is not a small one – advertisers that successfully use keyword attribution for call extensions in paid search platforms have seen cost-per-acquisition (CPA) decline

by as much as 50 percent. You’d be hard pressed to find another blind spot that could be so easily turned into a major competitive advantage with a little basic data.

There’s no doubt that, in competitive industries, early adopters will have a leg up that could be the difference between fighting to stay ahead of the curve and becoming an undisputed industry leader.

So what does that look like? While key learnings vary by industry, one insight is universal: data impacts far more than just advertising. In many cases, data will affect the overall business strategy and future product offerings as well.

Car Dealerships

Take the auto industry. With the rise of smartphone use, dealerships are experiencing a significant increase in the volume of phone calls from consumers.

Data from a 2014 Marchex study of ad-driven phone calls to dealerships reveals that 77 percent of calls are from new customers, with most of these calls for parts or service.³

Call data also shows that, for the average dealership, 16 percent of calls go unanswered. And when they are answered, most of the time, the respondent doesn’t try to schedule an appointment. By addressing these concerns, dealerships could expect a boost in sales.

Cable Companies

Cable providers are notorious for poor customer service, long contracts and pricey package deals. But with subscription streaming services like Netflix, Amazon Instant Video, and HBO NOW, they’ve got competition. To stay afloat, cable companies need to find out what consumers want and respond to it.

Marchex analyzed call data to identify key weaknesses in the current cable business

¹ investors.marchex.comphoenix.zhtml?c=175199&p=irol-newsArticle&ID=2072937

² www.marchex.comassets/pdf/protected/WP-Marchex-4Billion-blind-spot.pdf

³ investors.marchex.comphoenix.zhtml?c=175199&p=irol-newsArticle&ID=1970336

model and propose a solution.⁴

Programming is one of the biggest sticking points. But the data shows that allowing consumers the flexibility to customize content builds brand loyalty and increases perceived value. So, by taking a more flexible *la carte* approach, cable providers can better satisfy choosy consumers.

Embracing technology is also essential. In the mobile age, the cable box alone just doesn't cut it. Five times as many consumers in the study asked for ESPN compared to Fox Sports. Given that ESPN offers a markedly superior online experience for those with a cable plan, the importance of giving consumers access to content anytime, anywhere can't be ignored.

Flights, Hotels and Rental Cars

Now let's talk travel. Mobile bookings are the fastest-growing segment in travel today. This year, more than 20 million consumers are expected to book trips on smartphones, according to eMarketer, a 150 percent increase from 2010.⁵

4 investors.marchex.com/phoenix.zhtml?c=175199&p=irol-newsArticle&ID=1996783

5 www.emarketer.com/Article/Takeoff-Time-Airlines-Mobile/1012249

The drastic shift towards mobile booking makes sense when you consider the context. By nature, travel is done on the go. Consumers on desktops are in research mode, but on mobile, they're in purchase mode – and a greater sense of urgency leads to a greater intent to book. The data supports this, with conversion rates consistently over 25 percent for rental cars and over 20 percent for hotels.

What's been stopping companies isn't that optimization is difficult; it's that previously, the information just wasn't available

So how can travel companies capitalize on this shift?

It starts with recognizing the importance of over-the-phone bookings and prioritizing accordingly. For a start, companies should employ more staff at call centers and reception areas according to the volume and type of incoming calls. Rental car companies, for example, should staff more

heavily in the morning because many callers are looking to drive a car off the lot that day.

Hotels can also boost click-to-call conversions by offering special perks to a few common customer types. Freebies, like breakfast or complimentary spa service will satisfy deal seekers, while a free upgrade will be more enticing for the caller who wants the VIP treatment.

When you have the data in front of you, these recommendations make perfect sense. What's been stopping companies isn't that optimization is difficult; it's that, previously, the information just wasn't available. But with the advanced analytics tools that are now available, marketers can finally take control. ▼

John Busby is the senior vice president customer insight and marketing at Marchex. He leads the Marchex Institute, the analytics and insights team which publishes findings on advertising campaign performance, consumer data and market trends. Busby oversees all white papers and analyses and is a key strategic advisor to our clients.

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Picture This: Key Principles for Slide Design and Data Visualization

By Thomas Rigby

At some point in our careers, we've likely all had a similar experience: standing in front of a room of people with impressive titles, ready to enlighten them with a deck full of key insights and analyses...only to see the eyes of the audience darting around your first slide, brows furrowing and the unwelcome sight of confusion setting in.

"So we're the blue line?" one asks.

"No, that's the average..." whispers his incorrect neighbor.

"Wait, what's the x-axis again?" asks another.

"Are we going to order lunch?" inquires another audience member, already lost.

"You know, we're used to seeing bar charts here..." suggests a VP, not so subtly.

Standing there patiently, you would be forgiven for thinking that maybe we should just go back to the good old days, before PowerPoint became so ubiquitous.

Alas, while the field of design has long been a staple of advertising and other creative disciplines, when it comes to marketing research, one would be hard pressed to make the same argument. In fact, for many researchers, the idea of critiquing slides based on their aesthetics might even seem frivolous. After all, who cares what your slides *look* like, it's all about the numbers and the analysis... right? Wrong.

Contrary to popular belief, effective slide design, like design in general, is not about making things "look pretty." It's about using visual cues to achieve a functional purpose, and in the field of marketing research, our purpose is to communicate insightful information quickly and clearly. Reading reports or sitting through presentations shouldn't feel like work, but for many clients, that is the unfortunate reality. The good news is that being able to design visually compelling slides is not an inherent talent bestowed only on a lucky few by a higher power. Rather, it is simply the result of adhering to a variety of key principles that can be taught and learned like any other.

Contributor's Background

Before we dive into some of these principles, there's an important question you may be asking: just who died and made this person a design guru anyway? Well, nobody (thankfully). But as they say, necessity is the mother of invention and back in 2012, when my partner and I were launching our own marketing research agency, we were seeking every competitive advantage possible.

Infographics were becoming all the rage, and it dawned on me that cultivating a reputation for particularly compelling slides could be one way to gain an edge over our larger and more established competitors. Nonetheless, there was a slight problem with this vision: my design skills were lacking. Big time.

In turn, I consulted my go-to source for self-improvement: Amazon.com

As luck would have it, searching for books on "slide design" turned up quite a few hits – over a thousand in fact. And thus began my quest to becoming a slide design expert, starting first with one book, and then following up with 72 more. Obsessive compulsive? Perhaps. Beneficial? Definitely.

Having spent the better part of the last three years pouring over books, websites, Youtube videos, conducting interviews and attending conferences, I have been able to piece together commonalities and, dare I say it, become a bit of an expert in this particular area. While it would take a series of articles to summarize the subject of slide design in its entirety, in this one, I intend to highlight the three most basic principles that I think every modern researcher should know about.

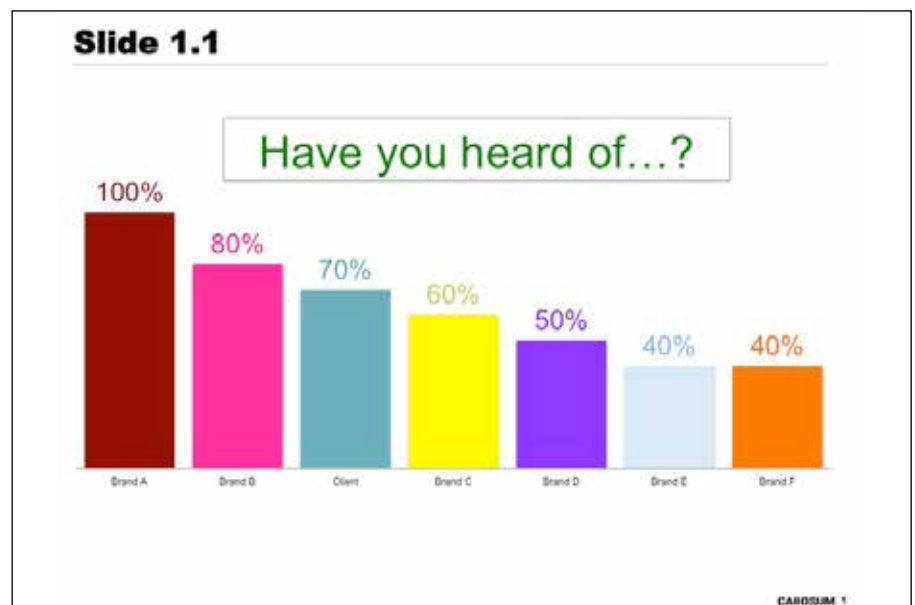
The Principles

Color and Contrast:

The use of contrasting colors (also known as "accent colors") is one of the best ways to ensure that your slide has a focal element and, in turn, that the most important information "pops out" from the slide. However, when it comes to color options, we can often find ourselves lost for choice. And therein lies the problem. With so many at our disposal, slides frequently end up resembling a kaleidoscope of colors that, while visually impactful, do nothing to improve clarity of message.

With this in mind, a useful rule of thumb is to limit yourself to three or four colors on each slide and to continue using these same colors throughout your deck. This helps train the reader on where to look first on each slide and provides a certain degree of unity from page to page. The colors should typically include one background color, one or two foreground colors and one accent color (used sparingly).

Let's look at two examples that use basic bar charts to illustrate the power of contrast. In slide 1.1, the brands are all assigned their own individual colors. As such, when looking at this slide, one reader's attention



may be drawn to Brand A's result (the highest score) while someone else might focus on Brand C (the score in the center of the page). This inconsistency occurs because there is no clear or dominant element.

Slide 1.2 on the other hand, makes much better use of contrast and leaves no doubt as to where the reader will look first. By limiting ourselves to four color options – one background color (white), two foreground colors (grey and black) and one contrast color (blue) – the reader is visually guided to look first at what we feel is the most important result (client's score). In other words, the client's score is given visual precedence over all other results. This guidance is helped further by the fact that three of the four color options are very muted in tone and therefore, contrast strongly with the vibrant blue.

As you work through your deck, ask yourself what the one thing is that you hope readers will take away from each slide, and then make sure that this element is always given a contrasting color.

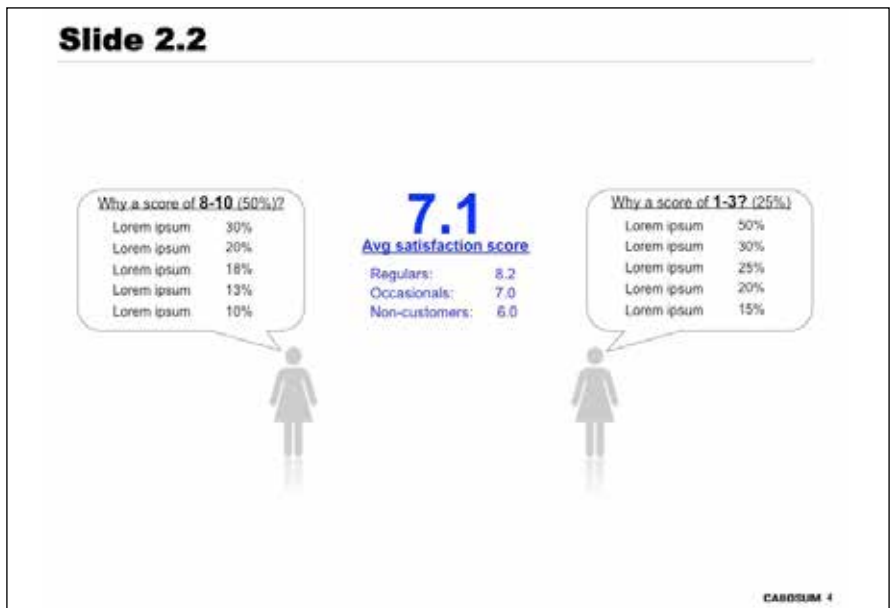
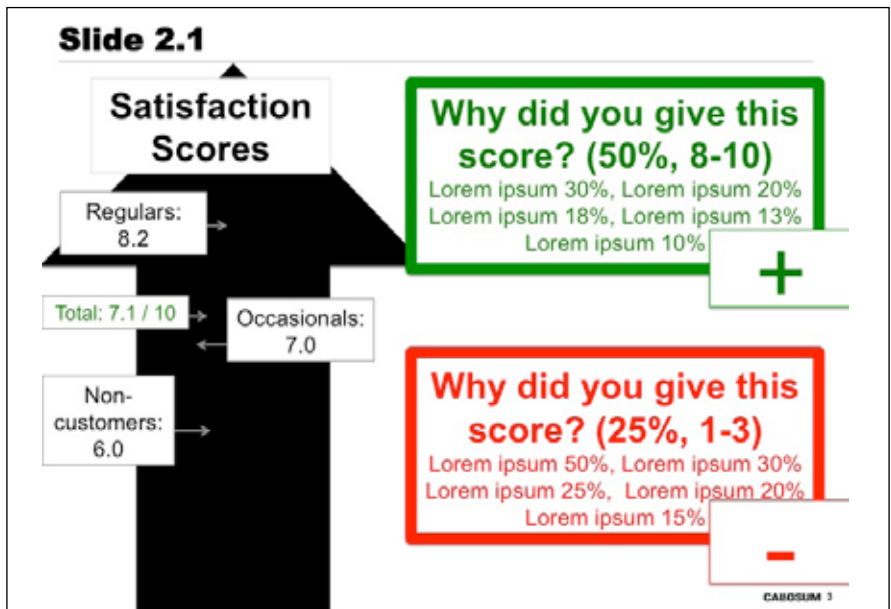
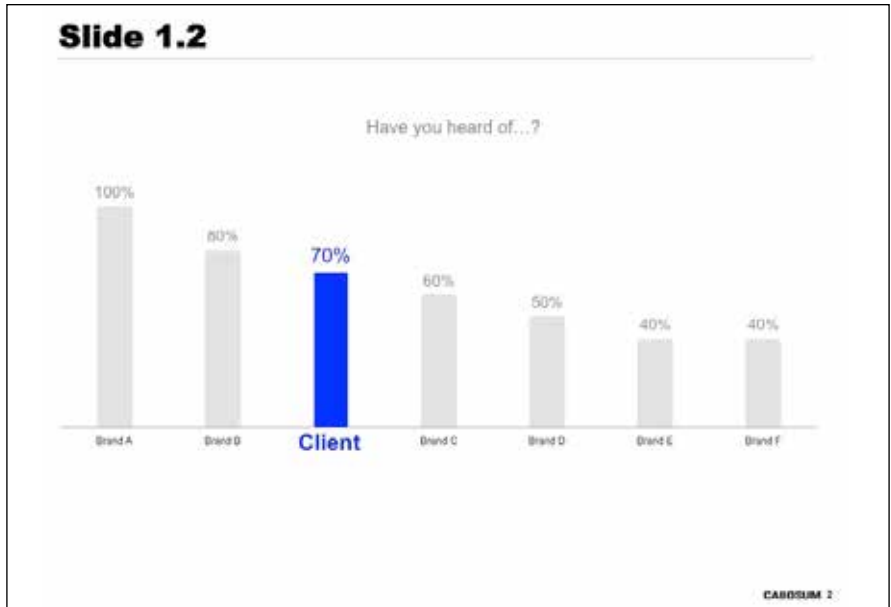
Whitespace:

Leonardo da Vinci was once quoted as saying, "simplicity is the ultimate sophistication." The subtext of this quote, of course, is that achieving simplicity is, ironically, not simple at all. Rather, achieving simplicity is the end result of deep reflection and a determined effort to separate that which is absolutely necessary from the superfluous. This wisdom is likely applicable in every field of design, but it seems particularly relevant in the context of PowerPoint, where a couple of effortless clicks can add the needless complexity that da Vinci advised against. Protecting a slide's whitespace is one way to help ensure that simplicity is maintained.

The term whitespace refers to the areas of a slide that are intentionally left empty. (Depending on the background color, these areas may or may not actually be white.) The idea is that, the greater the whitespace, the fewer opportunities there are for readers to be distracted from what you want them to focus on. Let's look again at two examples that highlight this point.

Slide 2.1 is based on a slide that I recently came across while going through a client's previous research. Looking at it, my initial thoughts were twofold: 1) With all this clutter, I am going to have to really focus and work hard to understand the results, and 2) Christmas is coming! In both cases, my reaction was likely not what the researcher was hoping for.

As can be seen in slide 2.2, placing a greater emphasis on whitespace resulted in an entirely different look with far less clutter and, in turn, information that is much easier to digest. Perhaps most important is the fact that this enhanced clarity was achieved without making any changes to the actual amount of



data included. Both contain the exact same number of results.

Being conscious of whitespace and asking yourself whether each element of your slide is absolutely necessary will help lead to less cluttered slides, and ones that let the truly important information shine through. Understandably, there will always be clients who prefer to see every result across a multitude of subgroups, but that does not mean that all of this data needs to be concentrated on the *same* page. Oftentimes, information that is included on one can be redistributed over several, rendering each one easier to absorb. Remember, slides are free!

Alignment and Proximity:

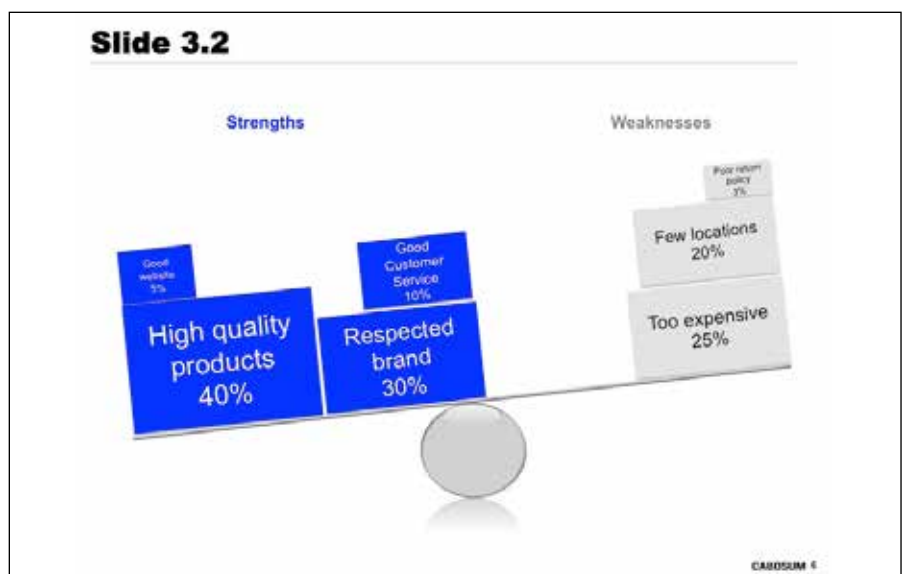
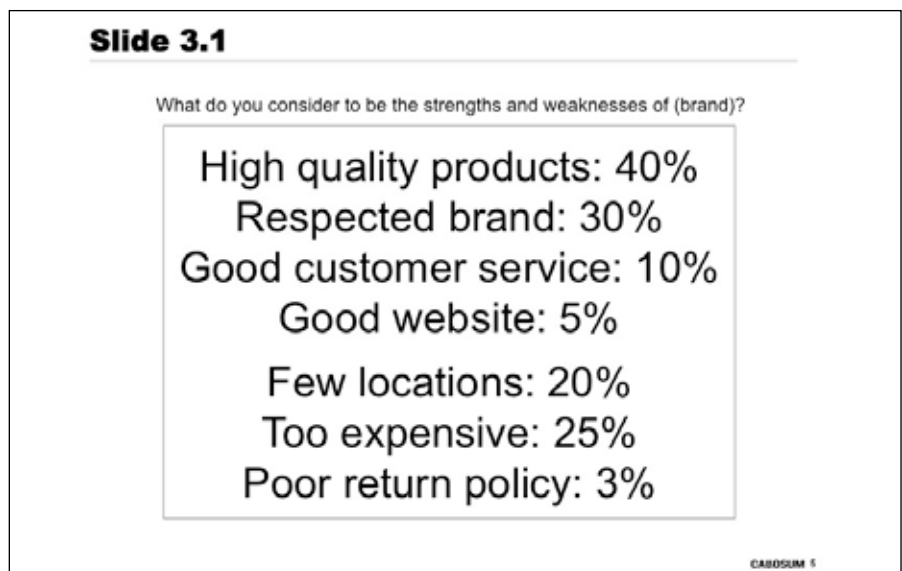
If there is anything slides are frequently guilty of, it's haphazard placement of objects and information. At best, this makes a slide seem unprofessional; at worst, it can actually lead to confusion or misinterpretation of results.

When it comes to deciding where to place your objects, there are certain natural tendencies readers have, and these can help guide your decision-making. For example, knowing that, in most cultures, audiences read from left-to-right, you can use this to your advantage and convey what you consider to be the most important information on the left side of the page and the secondary information on the right. By the same token, objects that are close together in proximity are generally perceived as having commonalities or as being part of the same group. Objects that are further apart are generally perceived as being unrelated or being the opposite of each other. The examples below highlight the impact that proper alignment and purposeful proximity can have

Slide 3.1 was an attempt to express the results of an open-ended question about the strengths and weaknesses of a brand being evaluated. However, with no focus being made on alignment, it is difficult to discern the relative importance of each mention. Furthermore, both positive and negative mentions are included in the same box and share close proximity, making it difficult to quickly conceptualize what the brand's strengths and weaknesses are.

With a few modifications, slide 3.2 better aligns the various results to clearly show which are the most prominent. Furthermore, all strengths are in close proximity and are clearly separated from the perceived weaknesses, making it easier to absorb both groups of responses. If you look closely, the balance beam even scales left, suggesting that, overall, the brand generates more strengths than weaknesses.

By more purposefully selecting the angles, alignment and placement of data and information on a slide, the end result is often



a more organized page that will help guide the reader's eye along their natural path.

Further Reading

In conclusion, it is important to keep in mind that these principles are meant to be complementary and that developing visually impactful slides will require that you use each one in unison. For example, it's whitespace that will help your contrasting color stand out and alignment that will make your key insights jump out at readers so that their attention will be retained page after page.

Nonetheless, these principles only scratch the surface of a very broad field and there is naturally far more to learn than can be summarized in this one article. For those interested in doing just that, I strongly recommend reading anything by Nancy Duarte (*Slide:ology, Resonate*) or by Garr Reynolds (*Presentation Zen, Presentation Zen Design, The Naked Presenter*), both of whom could be described as pioneers in the industry.

There are also a host of great online resources such as visual.ly, slideshare.com and slideshow.com. In fact, just Googling "infographics" can be a quick and easy way to find new inspiration.

As the zeitgeist would suggest, "design-thinking" is becoming more and more prevalent across industries and product types and it is no exaggeration to say that we now live in a design-focused world. In turn, if we look closely enough, we may just find that the visual inspiration we need lies all around us. ▼

Over the course of his career, **Thomas Rigby** has completed more than 500 marketing research studies and, in 2012, he helped co-found Calosum Marketing Inc., a partner to many of Canada's largest and most successful brands. Rigby also serves as a guest lecturer at HEC Montreal on the subject of marketing research and, in 2016, will be providing courses for the *Infopresse* organization in Montreal, Canada.

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