

"...a roadmap of what lies ahead."



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2015 MRA INSIGHTS & STRATEGIES CONFERENCE (ISC)

10 THINGS MARKET RESEARCHERS
NEED TO KNOW ABOUT THE INTERNET OF THINGS
THE WEARABLE MEDICAL DEVICE IN YOUR FUTURE...

INTEGRATING DATA INTO A HOLISTIC VIEW





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Upcoming Conferences

June 3-5, 2015 MRA Insights & Strategies Conference San Diego

October 5-7, 2015 Corporate Researchers Conference St. Louis



We considered 134 speakers. We chose 41. "You'll see those most important to you." MRA's annual Insights & Strategies Conference (ISC) concentrates in depth on practical, applicable skills you can leverage today while revealing a compelling roadmap of what lies ahead. Five world-class keynotes and four highly-curated educational tracks center on the future, consumer insights, specialty research and tech demos. More than 50 exhibitors will showcase new innovations and approaches. Combined, ISC is a phenomenally target rich opportunity for education and networking. See page 81 to learn about the full program.

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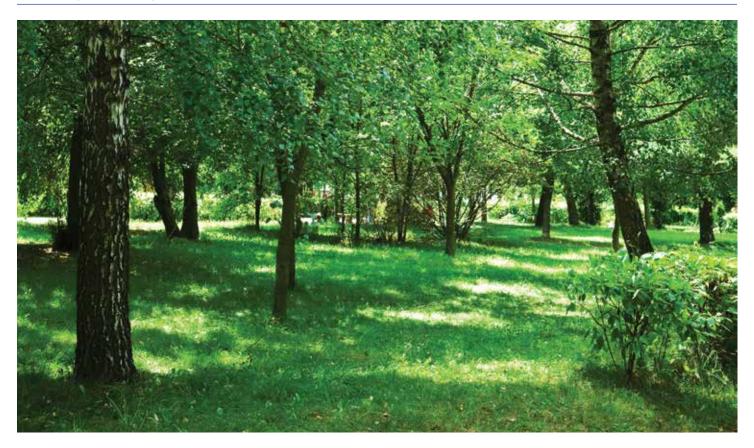
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More Informed and Better Decision-Making

By Amy Shields, PRC



n the early '80s, S. Allen Heininger, vice president at Monsanto at the time, said, "Research plants the trees so that others can some day sit in the shade." While this is a lovely (if not limiting) sentiment, I'm not convinced it rings true in today's marketplace, chalk full of disruption by way of rapid social, technological and economic change. In fact, the marketing research "noise" is often so loud that it's hard to clearly hear or communicate insights, determine which tool(s) to use

1 https://hbr.org/1982/01/the-nurturing-of-corporate-research

or predict future trends and analytics...let alone be confident in applying outcomes in a strategic, sometimes even tactical manner that allows for more informed and better decision-making.

For the purpose of simplicity, MRA has defined a corporate research member as, "Individuals who are employed at an organization whose clients are internal. They are not involved in the sale of their research, analysis or services, and their work is not for sale or compensated use outside of their organization." What this definition doesn't effectively communicate is the special set of challenges corporate researchers face—which we continuously learn more about through our own highly prioritized internal research with this industry segment.

This Corporate Research issue, we took a slightly different approach than in past years and sought contributions not from, but for, buyers of research. Because, let's face it: the corporate insights function is no longer the only gateway to critical business data.² With "outsiders" entering the MR space at a never-before-seen rate (think insights-driven competition from social media/Big Data, the

Internet of Things, software, client/consumer management systems and consulting companies), the next-generation researcher, tools and technologies are informative (and fun!) areas for focus.

At first glance, it might appear there are duplicative topics – but upon further review, you'll see clear distinctions. There are some central themes (mostly involving integration of results using multiple sources, new technological platforms and the wearable device market), but each contribution takes us down a different storytelling path about the future. We hope you agree that this is an especially exciting issue meant to encourage (dare we say, demand) change.

I hope to see, welcome and meet you June 3-5 at the Insights & Strategies Conference (ISC) in San Diego, where inspiration for new ways of thinking will abound. It's a guarantee that I will not be sitting in the shade but basking in the air of excitement that always accompanies this annual event, which is dedicated solely to furthering the growth of the marketing research industry.

Amy Shields, PRC is MRA's director of research and the editor of *Alert!*. She can be reached at amy.shields@marketingresearch.org.

² www.sagepub.com/upm-data/43895_ Epilogue.pdf

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Innovating in a Crowded Space

By Ted Donnelly, PRC

We've all heard the age old adage, "Necessity is the Mother of Invention." While often true, this does not accurately epitomize the current conference environment in the marketing research and insights profession.



A quick Google search will reveal over 50 "unique" offerings for in-person education and networking. This is a relatively small industry, folks. Lots of hyperbole bubbles up in the marketing, but how does one event truly differentiate itself in this landscape? Indeed, it is a crowded arena with new shows regularly spotting the calendar. Additional events clearly are not being procreated by necessity.

MRA's take on the professional development space could instead be summed up by Mason Cooley's "Art begins in imitation and ends in innovation." That is to say, we readily acknowledge that the conference itself is not a unique concept, but to put on a successful event, you need to be transformative. The industry is not crying out for more seminars and workshops. However, as professionals, we continue to seek uncommon content, new opportunities and any inspiration that can help give us an edge in our respective businesses.

For nearly 45 years, MRA has been curating marketing research seminars, often to critical acclaim. That longevity does not come without the ability to evolve and effectively fill gaps in the marketplace. This year, in addition to dozens of chapter offerings, MRA is playing host to three national meetings.

In February, the association held its biannual CEO Summit in the esteemed hills of Napa Valley. The perfect setting for the retreat-like format, top industry business leaders from around the globe congregated in Wine Country to seek inspiration, benchmark, share best practices, and strategize for the future in a dynamic business climate. The formal program itself was exemplary, but the intangible benefits

were incomparable. Attendees were privy to three days of insightful and intimate conversations with an extraordinary group of C-level leaders in a non-competitive environment. Many attendees declared it the single best industry event they had ever attended with pleas to make it an annual affair. Plans are underway to host this event annually (Miami 2016!), as well other similar formats for other niche professionals within the industry.

As spring gives way to summer, MRA will hold its Insights & Strategies Conference (ISC) the first week of June at the Hilton San Diego Bayfront. A mainstay on marketing research calendars, ISC offers more of a deep dive into practical skills than you find at the average trade event. The show kicks off with optional all-day training sessions to provide the applied, how-to manual it's challenging to reach at standard conference breakout sessions. With four carefully crafted tracks, ISC overlays a rare blend of contemporary methodology with more daring and pioneering, allowing attendees to chart the future path for both their company, personal brand and long-term career. Content partnerships with Research Rockstar, Actus Sales Intelligence, and the Qualitative Research Association (QRCA) will deliver an expansive view of the profession. Additionally, the event will feature five topflight keynotes, four of which come from outside the MR profession. With about 40 speakers providing an in-depth look at the present and future of the industry, MRA feels compelled to demonstrate thought leadership from beyond our confines to provide indispensable business trend insight, inspiration and vision for change to

MRA's final conference of the year will be the Corporate Researchers Conference (CRC) in St. Louis. This is arguably the most unique event based on concept alone. CRC was the offspring of an observation that the majority of industry educational content was focused on supplier issues. Aside from the odd session at a larger conference, there was not a safe haven where corporate researchers could come together to share business challenges impacting those who manage or oversee the research and insights function at companies who sell something other than research. Hence, CRC was born as the only conference programmed by and for corporate researchers. Programming is well underway and there are some new innovations planned. One will be a matchmaking service to help forge more compatible (and desired) connections for buyers and suppliers than can often be consummated over the proverbial conference chicken luncheon. There will be many other surprises in store as well

In my years, I have rarely seen such comprehensive dedication to the process of concepting, planning and vetting conference content as I have in my experience with MRA. We are blessed to practice our trade at a time in history when there is no shortage of professional development content. With that comes greater demands on our time and more noise to break through to find truly exceptional and custom-tailored education. MRA readily acknowledges this challenge and will continue to remain committed to the path of innovation over imitation.

Ted Donnelly, Ph.D., PRC, is the managing director of Baltimore Research and the Chairman of MRA's Board of Directors.



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- ✓ Corporate Researchers Conference (CRC) takes place in St. Louis October 5-7. For more information, visit crc.marketingresearch.org or contact Jennifer Cattel at jennifer.cattel@marketingresearch.org. For exhibiting and sponsorship opportunities, contact Lisa Lockwood at lisa. lockwood@marketingresearch.org.
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10 THINGS MARKET RESEARCHERS NEED TO KNOW ABOUT THE INTERNET OF THINGS

By Sean Campbell and Scott Swigart



THERE WILL BE FAR FAR MORE THINGS USING THE INTERNET THAN PEOPLE.

f you're involved in market research in a technology company, or in a company that's becoming more technologyfocused (which is basically everyone), then you're probably hearing more and more about the Internet of Things (IoT). In fact, an IoT project may have already come across your desk.

For a quick definition, the IoT refers to devices that send data over the Internet. This could be a consumer device such as a smartwatch that's sending your heart rate and sleep cycle to the cloud, or a business device like a smart power meter that, every minute, sends data on your power usage.

The analyst firm Gartner, Inc. predicts that there will be 26 billion IoT devices by 2020.1 Business Insider expects that, by 2019, it will be the largest device market in the world, "more than double the size of the smartphone, PC, tablet, connected car, and the wearable market combined."2 In short, there will be far, far more "Things" using the

- 1 www.gartner.com/newsroom/id/2636073
- 2 www.businessinsider.com/how-the-internet-ofthings-market-will-grow-2014-10



Internet than people.

In this article, we'll walk through 10 "truths" to bring you up to speed on this megatrend so that you can lead more effective research in this rapidly evolving (dare we say, exploding) space.

#1 - "Old-School" Industries Will Matter

When people think of technical innovations, they often (rightly) assume that these will take hold first in Silicon Valley, but the truth is that many of the early adopters of IoT will be old-school industries such as manufacturing, natural resources and government. The reason is because these are capital-intensive segments in which efficiency is prized and they are ripe for "sensorification."

As an example, it's expensive to inspect thousands of miles of oil pipelines. But pipelines can be instrumented with sensors that can instantly detect a pressure drop in one section, indicating the precise location of a leak. This allows faster response and limits the impact on local communities. As another example, a modern GE locomotive has "more than 6 miles of wiring and 250 sensors generating 9 million data points every hour to run as efficiently as possible."3

And in government, the term to watch is "Smart City," which involves monitoring of parking, roads and traffic, noise, crime, the environment and more. Already, cities are filling up with license plate readers.4 Citizens and leaders will soon have more data than was previously imaginable.

So when you're thinking about markets and segments, be prepared to look at industries that have historically been laggards in technology adoption. Don't leave out manufacturing, mining, government, insurance, energy or agriculture.

#2 - All That Hardware Is Really **About Software**

While the nerve endings of the IoT will be hardware sensors, the real value is going to come from software. Each sensor will emit a steady drip of data. But, for the most part, sensors will be designed to be cheap, replaceable, and really "only so smart." The drips of data they emit will aggregate into a raging torrent of information that must be stored and analyzed, sometimes in near real-time. That's going to require staggering amounts of processing power and a lot of code. If you want to understand the use cases, you'll want research to focus on

the person cranking out that code (or the software architect they serve) more than on the person holding the soldering iron.

#3 - It Will Live in the Cloud

IoT will go hand in hand with cloud computing, Big Data, streaming analytics, machine learning and data visualization. Since the IoT sensors will be Internetenabled, they'll usually be sending data to, and receiving commands from, the cloud. Cloud vendors like Amazon Web Services. Microsoft Azure. IBM BlueMix and others will be huge beneficiaries of this trend. These services will let startups get off the ground without huge capital investments, let them "pay as they grow," and let them hone their business models and algorithms.

#4 – There Will Be Three **Enormous Markets**

Much of the press regarding IoT focuses on wearable technologies, smart thermostats (such as Nest), home security, and (for reasons we don't understand) smart refrigerators. But the consumer market will be dwarfed by business and government uses. Outside the old-school industries mentioned earlier, the possibilities for supply chain optimization, warehouse instrumentation, remote monitoring of inhome healthcare, energy-efficient buildings, smart retail, fleet management and many other enterprise use cases are enormous.

When constructing research, the place to start is to investigate where existing business processes could be greatly enhanced through instrumentation and intelligence. For example, how could a fleet of delivery vehicles provide intelligence and improve efficiency if they were "sensored up"? Then consider investigating completely new paradigms that will only be possible on an IoT substrate.

#5 – Look More at Landscapes Than at Individual Players

Let's face it: we're in the "gold rush" days of the IoT. Players are going to rapidly come and go. Consolidation hasn't even started. What's most important at this stage is to understand the topology of the landscape. Think in terms of markets rather than specific players. The playing fields aren't going to change as fast as the teams.

Much of the research opportunity, at this stage, will be focused on investigating entry into a market and thus a broader view will be critical.

#6 – Today's Customers Are Not **Tomorrow's Customers**

And today's partners are not tomorrow's partners. Case in point: John Deere has "APIs" in a program that software developers

³ www.gereports.com/post/96631617065/ forget-the-iron-horse-here-comes-the-iron-snake

⁴ spectrum.ieee.org/cars-that-think/ transportation/sensors/privacy-concerns-growas-us-police-departments-turn-to-license-platereaders

can join.⁵ Let that sink in. That means that some of John Deere's new customers are programmers. While we pine away for self-driving cars, self-driving farm equipment is already here. Drones will take over crop dusting.⁶ Robots will replace security guards.⁷ Do you think the corporate campus facilities department has ever dealt with a lot of robot vendors? Huge amounts of learning will be needed to figure out both the buyer and seller side as customers and vendors touch for the first time.

When constructing research studies, be prepared to throw out all assumptions of who customers, partners and vendors are. Historical norms will limit you greatly here.

#7 – Qualitative Research Will Be King

We are very much in the discovery phase of this trend. A quantitative survey instrument would be built almost entirely from guesswork, and respondents will likely not even understand the questions or interpret them the same way the researchers do. The high-value research will be qualitative. It's going to come from in-depth conversations about use cases. What are people trying to do? How are they trying to do it? What have they learned along the way? What unexpected problems or benefits did they experience?

#8 – Partners Will Know the Most First

Customers aren't that knowledgeable yet. Suppliers will hope to have guessed right when making products.

Imagine you want to understand the market for the IoT for high-rise energy efficiency. You could conduct interviews with end customers who have had such systems installed. In your research, you could learn the triggers for making this investment, find out which vendors they considered and hear how the implementation went. That would all be great research, but each customer would only know their one and only case.

Now imagine including partners who had each performed a number of implementations in your research. They could go beyond the one customer experience and talk about what's driving buyers in general, and what really resonates with them. They could describe how they've stitched products together from multiple suppliers to make a complete solution. They could talk about what's lacking in products

- 5 blog.soa.com/john-deere/
- 6 modernfarmer.com/2013/07/drones-drones-on-the-range/
- 7 www.dailydot.com/technology/microsoft-robot-security-quards/



today and where they see opportunities. Because of their experience, they will have steered around pitfalls that the end customer was never aware existed.

In the early stages, customers are going to be looking for partners to be trusted advisors, and for a very good reason – the partners performing the implementation will actually be the most knowledgeable people in the value chain.

#9 – This Stuff (Mostly) Isn't Going to Be Secure

The market will be dominated by 900-pound gorillas like Cisco, Microsoft, Intel and GE, but also by startups that didn't exist three years ago. The big vendors will do a good job with security. Cisco has been building secure network devices, since, well, before there was an Internet. But the startups will be where much of the compelling innovation happens. And building something secure is much more expensive than just building something that works. Most of these startups will be deliriously happy to simply get the kind of market share that makes their device worthy of cyberattack.

As a result, the security aspect should be a component of many research projects. How much do buyers in a sector really care about security? And if they say they care, does that concern actually seem to carry over to purchasing behavior? These are all good questions.

#10 – Look for Quantitative Data That's a Real Leading Indicator

There are times when you can run a quantitative survey and there are times when you can just ask the Internet. For example, consider the graph at the top of this page.

This data comes from *Indeed Trends*, which will simply graph how frequently a

term shows up in all the job postings that they index (millions). We've found that job postings are a good leading indicator for a trend, especially a technical trend. Here's another – want to know which large companies are making the biggest IoT investments? Just ask LinkedIn:

This kind of data abounds, can be very cost effective (read: free), and provide substantial early insight. It doesn't replace quantitative research, but it can augment quantity and quality in powerful ways.

Conclusion

If, in 1995, you had said that the Internet was going to disrupt most industries, many would have scoffed. In fact, many did. But, looking back, what do we see that remained untouched by the Internet? Virtually nothing. Blockbuster was blown away by Netflix. Kodak lost to the digital camera and instant photo sharing. Encyclopedia Britannica fell to Wikipedia. Amazon crushed bookstores, first, and then others in retail. Uber and Lyft are taking on taxis. How did you buy your last plane ticket? Your last insurance policy?

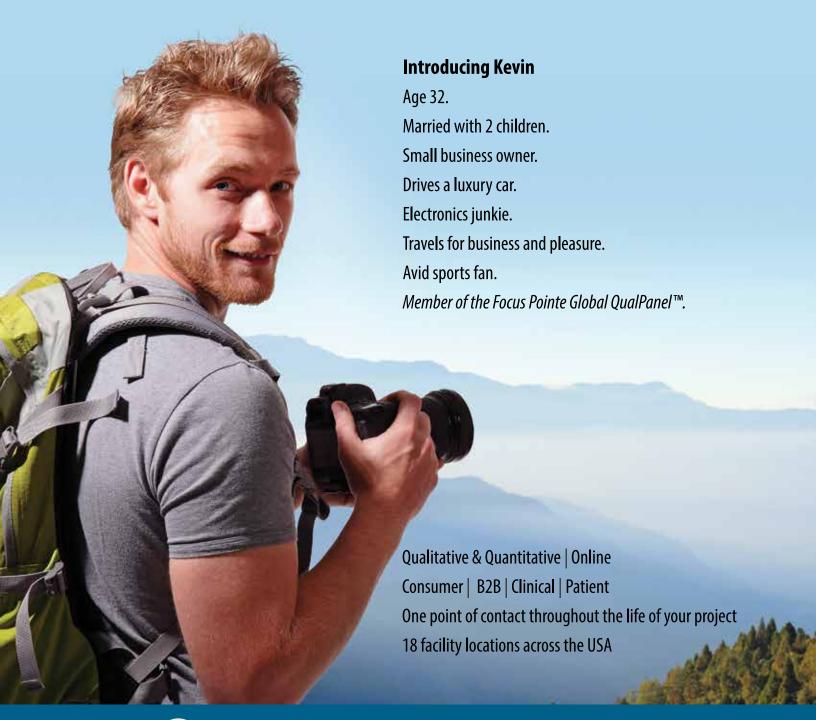
The IoT will cause a similar reconfiguration. The spoils will go to those who figure it out first. And it's the trend that's launching a thousand research projects. Hopefully, this article has helped put a few more things on the checklist for your next IoT research project.

Sean Campbell and Scott Swigart

are the CEO and president respectively of Cascade Insights. Cascade Insights specializes in competitive intelligence and market research services for B2B technology companies. Their B2B and tech sector specialization helps deliver detailed insights. To learn more about Cascade Insights, visit www.cascadeinsights.com.

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Ryan Dunn

Nicholas Fonseca

Nathan Gelman

Cherilyn Gordon

Abigail Gorzalski

Kaitlyn Hartnett

Kshamindri Hewage

Michael Klaus

Tingwei Lee

Gavin Sanders

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Kristen Slater

Brittni Vallette

Jiagi Wang

Ping Wei Xiaoxu Wu

Jing Yang

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Associate Professor

R. Dale Wilson Professor of Marketing



www.MarketingResearch.org Redux & Making the Case

By David Almy

As researchers properly hyper-sensitive to trends and innovation, you may have noticed that as of 2015 everything conceivable can either be achieved or at least ordered online, usually with free shipping. I know this is true because I read it on Wikipedia.



Way back in 2012, our Board directed me to fully modernize MRA's online presence and capabilities by establishing a series of online platforms that would facilitate many of MRA's member benefits electronically, integrate our committees and chapters with those systems, and be responsive so that that presence worked natively on mobile devices.

"A piece of cake," I replied. "Let's do it." Two plus years later. MRA's new website is "live" today, in first draft, with still more to come. As with all websites, we're undergoing usability and technical testing that will result in rolling improvements, so if you see something that's out of kilter or missing, please note it to us and we'll get it on the list for a fix. Also note that even though we're "live," we're not done with features. Additional functionality is in the pipeline.

Perhaps most important to note is that you have a public profile on our new site that you can create and tailor to put your best foot forward. It's there so that you can introduce yourself to other members by profiling your skills and abilities. It also can serve as a background for buyers of research to become more comfortable with you by exploring your research-specific background.

Your member profile differs from LinkedIn in that it is intended to be researchspecific. That summer you flipped burgers at McDonalds (something I also did long

ago) would not be included, as it's not really meaningful to a research profile. I know that I, at least, wasn't thinking about research at

We have opened the site to memberauthors beyond just member profiles. Our chapters and committees have been asked to provide web content editors to manage, with our help and training, their own corners of our site. One cool byproduct of this miniature crowd-sourcing concept is that the chapters will be able to piggyback on our system to automate event marketing, registration and ecommerce. And it's ready today. Our committees will also be able to publish their latest accomplishments and

Blog postings are also expanding. Blog postings of the chapters or committees which are posted on their home pages automatically appear on MRA's new home page, and will also be publicized to the full membership in MRA Update every Tuesday.

Got something to say? Say it on MRA's

PRC has been rebuilt from scratch to work better on the new site. An enormous amount of effort has gone into revamping PRC. Like our new member profiles, PRC profiles have been created in a different. more elevated style to allow those who have achieved PRC to publicize their achievement. A new system was also built to enable the management of PRC credits to be easier and faster. And there's more to come on PRC.

Our webinars will be expanding and have been completely updated using Adobe Connect, a state-of-the-art webinar delivery and archiving system.

That's just a start. Visit our new hangout on the web soon and send us feedback. It's being built for you, so your opinion counts!

Making the Case

Recently a member wrote describing a prospect they were looking to pitch. They reported that the prospect was very successful, at the top of their game and a market leader looking to expand into three new markets, but was not sold on MR given their successful track record.

"Why do MR if we're already geniuses?" they asked.

I thought about it and wrote five bullets on why I feel that smart research is instrumental to successful executives/ marketers. Here's what I said:

- 1. Confirm Decisions/Initiatives -Objective data can support a good decision or modify or reverse a bad one, in all instances supporting an organization's efficiency, effectiveness and - ultimately - success. Gut can be good, but it would be better if it's confirmed by evidence.
- 2. Uncover Surprises There are always surprises when studying markets. Although experience and intuition can be invaluable in market decisions, no person or team is omniscient in all markets. The right research, wellexecuted, can uncover the unexpected, which you can use to your advantage.
- 3. Track/Predict Market Trends Markets are dynamic. The market you know today will be different tomorrow. Markets change daily in size, location, attitudes, awareness and other characteristics, all of which can be benchmarked to predict future trends. This is a baseline requirement of nearly every sophisticated organization.
- 4. Your Secret Sauce Your competitors may well be gathering competitive intelligence on you and insights into your target audiences. Research can be part of your organization's competitive advantage to extend a class-leading
- 5. Do Smart Research All research is not created equally. Some research is clairvoyant; some lesser modes or methodologies can result in misdirection. As with most situations in life, you need to choose the right tool for the job. Don't scrimp on skill and expertise. Remember: garbage in...

I have no doubt that there are other reasons, but these were well received. They're also fun, so I thought I'd share them with you. Send me yours! 🔨

David W. Almy is MRA's CEO. He can be reached at david.almy@ marketingresearch.org.

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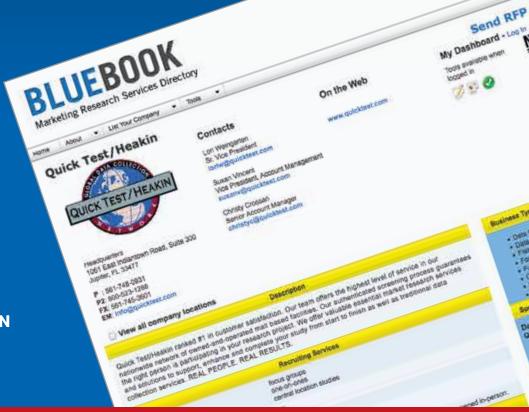
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Deconstructing the Mommy Myth: How Strategic Semiotic Research Created Value in the Diaper Category

By Laura R. Oswald, Ph.D.

emiotics is a hybrid of linguistics and cultural anthropology that examines the cultural codes which structure meaning in a set of data. Semiotics has important implications for marketers because managing the codes

that consumers associate with a brand or product category actually creates brand value. The data set can include consumer interviews, retail settings, package designs and popular media. The following case study illustrates how semiotics created value for a brand of disposable diapers by deconstructing the dominant cultural myth associated with the category and developing a distinctive and culturally relevant creative strategy. The Baby's Best brand name is a pseudonym and does not reference any brands on the market at publication.

Pampers leads the category by owning the Good Mother myth. In historical advertising, Pampers raises the functional benefits of dryness to the level of godliness.

The Meaning of Diapers

In practical terms, consumers buy diapers to avoid the inevitable mess created by babies who have not yet been toilet trained. However, the marketing media associate babies, mess and tidiness with ideological and moral standards related to motherhood. In a manner reminiscent of Claude Lévi-Strauss's raw versus cooked dimensions of culinary culture, the wet versus dry binary in diaper messaging is linked to a cultural ideal associated with the "Good Mother." The Good Mother/Bad Mother binary is embedded in a cultural paradigm that privileges control and even denial of bodily functions and that leads to a set of binaries structuring value in the diaper category, including culture/nature, control/chaos and sacred/profane.

P&G's Pampers leads the category by owning the Good Mother myth. In historical advertising, Pampers raises the functional benefits of dryness to the level of godliness. It associates the dry baby with a kind of victory of Culture over Nature. As the guardian of Culture, the "Good Mother" controls the liquids, flows, accidents and messes associated with Nature. The "Bad Mother," by implication, is out of control, messy and unable to keep a baby dry.

Furthermore, representations of the Good Mother in advertising for the category insulate mothers and babies from the messy reality of diapers in a timeless, luminous radiation. The repetition of these themes in the data set contributes to a kind of Mommy Myth that masks the real struggles of mothers. They satisfy, in the imaginary/ symbolic realm, the unmet emotional needs of real moms to meet the standards society expects of them.

Pampers' competitors face a difficult choice. They could compete head-on with Pampers with an even "Better Mother" image or play at the edge of the opposite pole, the "Bad Mother." Most, including store and generic brands, have opted to at least try to imitate the Pampers positioning in package design, leaving consumers with a bewildering array of identical products at the point of purchase. The case analysis shows how strategic semiotic research identified a new competitive space for Baby's Best by deconstructing the Mommy Myth altogether and targeting real, everyday moms. The Real Moms positioning competed with Pampers without engaging with the Good Mother/Bad Mother dialectic

Design and Methodology

Semioticians identified the Good Mother myth by decoding representations of babies, motherhood, and diapers in popular culture and advertising and by exploring secondary sources in the press and the writings of experts. Researchers collected messaging from retail sites, advertising, packaging and new products related to baby care in general. We examined popular self-help books, magazine articles and blogs related to parenting, baby care and motherhood. Researchers visited specialty shops in Chicago and Los Angeles, surfed websites and examined new products, technologies and fashion for this segment. Researchers also looked for these codes in popular television programs, movies and magazines devoted to mothers and babies.

The data set was limited to these cultural artifacts. Primary research with consumers was conducted after the semiotic analysis of the category was completed to flesh out in more detail consumer reactions to the Good Mother myth.

¹ Lévi-Strauss, Claude (1966). The Culinary Triangle. New Society, 22, 937–940

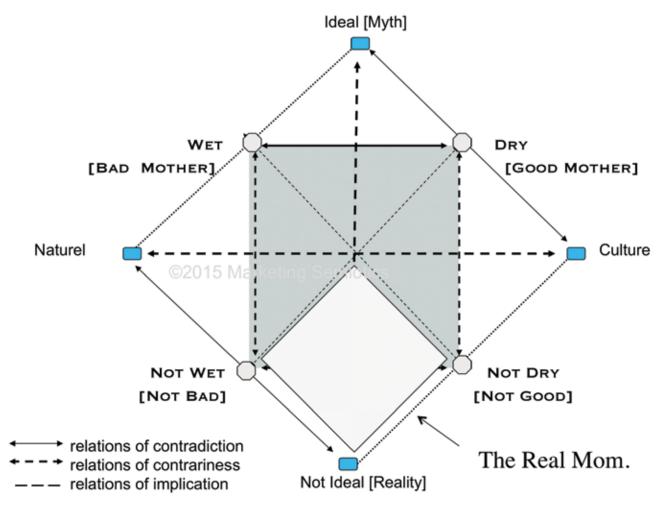


Figure 1. Deconstructing the Mommy Myth.

The Strategic Semiotic Analysis

The semiotic analysis began by deconstructing the Mommy Myth on a Semiotic Square into a more nuanced interpretation of motherhood and the role of diapers in that interpretation.

Greimas's Semiotic Square² is a strategic tool derived from structural semantics that breaks down the binary oppositions structuring a category into more complex relationships such as contrariness (i.e., notgood/not bad) and implication (i.e., good/ not bad, culture/not nature). The Semiotic Square organizes the constituent elements of a semantic category on a double binary grid comprised of three relationships: contradiction [S = S1 > S2], contrariness [-S = -S1 > -S2], and implication [-S = S1 >-S2 and -S1 > S2]. This three-dimensional structure accounts for the nuances and ambiguities that fall within the two poles of

the paradigm and extends the semantic complexity of the semiotic analysis (Figure 1).

The dialectical opposition of "wet" versus "dry" baby frames the dominant semiotic space for the diaper category as represented by the solid arrows joining the contradictory terms of Wet and Dry [S = s1 and s2] on the inner square. In order to account for the implication of wet and dry diapers in the ideological opposition of Nature and Culture, we projected another square on top of the first one, structured by the contradictory relation of Nature to Culture and represented by a solid arrow [S1a and S2a]. This approach both anchored the physical attributes, Wet and Dry, in the cultural context and increased the number of quadrants in which to position the Baby's Best brand.

Pampers and its clones were positioned in the upper right corner of the grid and associate dryness with order, tidiness and

the "Good." In order to move Baby's Best out of the "Good Mother" quadrant and build a unique brand positioning, we deconstructed the contradictory relations structuring the category into secondary and tertiary binaries. We traced secondary relations of contrariness (i.e., not Wet and not Dry [-S = -s1 and -s2]), associated by dashed arrows. We then traced tertiary relationships of implication, Wet and not Dry [s1 and -s2], and Dry and not Wet [s2 and -s1], using a dashed line.

This exercise led to the development of a new cultural paradigm for the category based on oppositions between a cultural ideal and the reality of motherhood. This paradigm emerged in a two-stage process. First, by breaking down the primary binaries (Wet/Dry, Bad/Good, Nature/Culture) into their contrary terms (i.e., Not Dry, Not Wet, etc.), analysis opened up an alternative to the rigid bifurcation of the category into moral absolutes such as Good and Bad, Nature and Culture. Second, by implicating

² https://www.cla.purdue.edu/english/theory/ narratology/modules/greimassquare.html

these contrary units in each other at the lower end of the Semiotic Square, analysis identified a counter-cultural space in the diaper brandscape that called into question the Mommy Myth and its underlying beliefs and values.

For example, the implication of "Not Wet" in "Not Dry" emphasizes the role of diapers in the real transitions between these two states. In this neutral space, diapers moderate the accidents and uncertainties associated with a baby's body, Nature, and a mother's busy life – they do not erase them. Furthermore, the implication of "Not-Nature" (-S1a) in "Not-Culture" (-S2a) places in question the assumption that Nature (i.e., the messy bodily functions) transcends Culture. In fact, a baby's toilet functions are not intrinsically "bad." They are censored from the dominant brand positioning in response to cultural biases about the role of mothers in society.

The Real Mom forms a counter-cultural space for busy moms who must negotiate the tensions between society's ideals and the realities of modern motherhood. It also mapped out a new competitive space for Baby's Best that sidestepped Pampers' Good Mother myth altogether. Secondary research suggested that the Real Mom positioning could draw momentum from counter-cultural representations of

This [semiotic] exercise led to the development of a new cultural paradigm for the category based on oppositions between a cultural ideal and the reality of motherhood.

motherhood in the popular culture. The counter culture uses irony to soften the blows of the cultural critique, making light of the ideal mother without violating the sacred sanctions protecting family, mother and apple pie in American culture. Programs such as Roseanne and The Simpsons use humor to demystify motherhood, give vent to the frustrations of everyday moms and provide an alternative representation of motherhood for the Baby's Best brand.

The disposable diaper category has lost value over the years due to a lack of brand differentiation. Generic and store brands claim a growing share of market by simply copying Pampers' Good Mother myth in packaging and by merchandising that features stereotypes of perfect babies and saintly moms. Failure to challenge Pampers' cultural positioning has lowered competition and profitability across the category. Baby's Best's innovative positioning opened new possibilities for competitive difference within the disposable diaper category based upon contemporary, more realistic expectations and perceptions of motherhood. As a result, strategic semiotic research proved essential for growing value in the category as a whole. V

Laura Oswald, Ph.D. is founding director of Marketing Semiotics, Inc., a brand research and consulting firm serving Fortune 500 companies on three continents. She has also taught marketing and advertising at ESSEC Business School and the University of Illinois Urbana-Champaign and speaks and writes regularly on semiotics and marketing. Oswald recently published two books with Oxford, Marketing Semiotics: Signs, Strategies, and Brand Value (2012) and Creating Value: The Theory and Practice of Marketing Semiotics Research (2015).



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Phone Research: Insanity or Competitive Advantage?

Learn more about the strategic value of phone-based research during Mary McDougall's session at **ISC 2015, June 3-5 in San Diego**.





re you constraining your research methodology based on outdated thinking or technology?

When Mark Twain reportedly said, "The reports of my death have been greatly exaggerated," I'm sure he didn't realize that more than 100 years later that message would also apply to phone research. In spite of what you may have heard, the phone is still very much alive and plays a critical role in multi-mode data collection. Don A. Dillman of Washington State University observes, "The hoped-for 'seamless' transition from telephone to Internet-only surveys has not happened. We need it [telephone], just as we need all of our data collection modes."1

Much marketing research has shifted from phone to online data collection as researchers seek ways to reduce costs. Today, many are rediscovering phones' newer technology and exploring the advantages of combining phone, online, and IVR in their research design. Historic barriers are coming down to enable data collection strategies that include not only mixed methods but also mixed vendors and distributed organizations.

Data collection with phone-based outreach has become an increasingly precise operation, intelligently targeting respondents and delivering hard-to-reach demographics. Fully-automated online surveys offer the beauty of low cost, labor-free data collection, but the profile of respondents is difficult to control since who responds depends upon the respondent's initiative. When you add phone, you can expand your reach, attain quota faster, and reduce the need to weight data.

Survey Design Considerations – One Mode or Many

Think about your reasons for doing research. These are generally focused on providing insights that drive business decisions, increase awareness or public opinion, and measure customer satisfaction. In defining the data collection methodology, however, many researchers limit themselves to whatever method they have in-house rather than the methodology that best fits the needs of the study. That's where multi-mode can make a real difference.

CUSTOMER EXPERIENCE: When you rely exclusively on a single data collection method, you may not be engaging respondents in the way they prefer, which lowers the cooperation rate.

VALUE: If you need more in-depth responses from one target audience

(which phone interviewing can deliver) but an abbreviated survey is sufficient for the majority, then you won't want to compromise by using just a single survey method. Choosing only one mode may lower the return on your investment by under- or over-surveying a segment.

REACH: If respondent demographic is important to your study, then the data collection method must reach those segments. As businesses and opinion polls are looking to get more accurate insights from consumers and citizens, they are moving to phone to fill quota. Nearly 90 percent of U.S. adults have Internet access but there are segments that an online survey cannot reach. Fortunately, 98 percent of adults in U.S. households can be reached via

Market Segments and the Need to **Add Phone to Online Research**

More than 40 percent¹ of the U.S. population over 65 and roughly 20 percent of minority, rural and lower income groups do not have Internet access.

Although Internet adoption is rising among seniors 65 and older, 60 percent in that group with a high school education or less do not go online.2

By 2017, approaching half of the U.S. population will be 50 or over and control 70 percent of the disposable income.³ Individuals 65+ will represent a large part of that group. With that kind of purchasing power, why weight their results when phone research can provide more accurate insights?

Increasingly, more people are accessing online surveys from their smartphones. However, while 77 percent of seniors 65+ own cellphones, only 18 percent own smartphones.4 So, they are much less likely to respond to an online survey from that device.

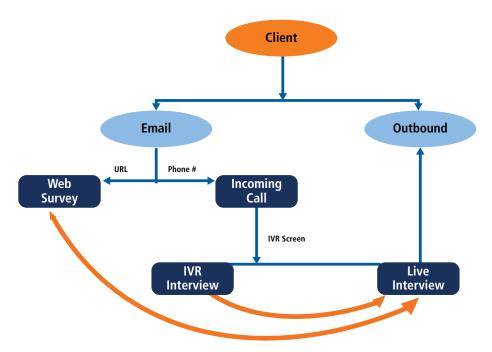
Don't let the mode you use constrain the impact and depth of your insights. By taking a multi-mode approach to accessing desired demographics in the way that best fits their needs, you can increase response rates and the breadth of respondents.

Engagement – The Customer's Way

Online research provides a cost-effective way to access respondents who prefer to be contacted that way. If you are trying to reach a young, more affluent and educated demographic, then online would be an effective mode. A busy professional, however, who reads the survey invitation on a smartphone, may prefer to interact with a short IVR survey or talk to a live agent for a hands-free experience. In contrast, a senior citizen may be more comfortable

Don A. Dillman, PAPOR presentation, Achieving Synergy Across Survey Modes: Mail Contact and Web Responses from Address-based Samples, December 12, 2013.

Multi-mode Data Collection Platform



Technology Barriers Are Coming Down

A Look at the Multi-Mode Research Process

New survey methods are being implemented that leverage one survey to conduct interviews in many modes – phone, online, and IVR – often distributing the data collection across organizations and integrating different vendor technologies. This is a cost-effective and practical approach.

Web Survey + Phone Interview + IVR Interview

- Researchers can use mixed-vendor, multi-mode solutions for efficient survey data collection.
- Online survey can be set up. Sample loaded. Survey launched Invites sent out.
- The same online survey can be used for other modes, such as in-person or phonebased interviews



- When phone is added, the study looks like other studies except the questionnaire uses the online survey for the interviewing script.
- The sample can be imported from the online survey platform to the call center automation platform for a consistent platform for reporting, interviewer, study, and operational productivity metrics.
- You can collect response data in a single repository and deploy this information in parallel or sequentially.

talking with an interviewer over the phone. In phone interviews, for example, the interviewer has the opportunity to explain a question in detail if the respondent needs help or doesn't understand a question.

Multi-Mode Data Collection

Today's technology enables research data collection operations to build flexible platforms that integrate online, IVR and live phone interviewing and employ them strategically to meet the needs of the researchers.

Investment - Differentiated by **Respondent Status**

Sometimes respondents are not created equal. In all businesses, certain segments of customers and employees are more important than others, so be strategic and take a multi-mode approach. For example, you may need more in-depth information from certain groups. So, use the survey across different modes based on the level of information and the value of the information you want from a respondent.

A business may consider interviewing most customers online and using phone to obtain more detailed responses from their preferred customers. Selecting a mode based on the value of the information from the respondent helps to control budgets and deliver strong ROI.

IVR - The "Other" **Phone Mode**

IVR offers the same reach as phonebased interviewing without the need for live interviewers standing by. Respondents can click to call into a survey and record their message quickly, easily, and cost-effectively. IVR can now be more seamlessly integrated into your multi-mode data collection strategies.

Demographics – Reached by More Cost-Effective Phone Data Collection

Public opinion research companies are experimenting with IVR-only studies to conduct short political polls and discovering an effective method to deliver the study within budget and meet tight deadlines. This approach has allowed them to scale without increasing labor costs. It has also enabled them the opportunity to offer another type of service to their customers and save their clients money. By having this new "product" in their portfolio - the IVRonly survey - they can grow their business.

Given today's TCPA cell phone calling restrictions, researchers have begun combining IVR with live phone interviewing

If you're surveying employees, you may choose to survey them all online. If you want feedback from top managers and you need more indepth details, extend the questions and conduct the interview by phone for that group. When you want to collect data from executives, consider interviewing them in person and using a tablet to fill in the responses. This same strategy works effectively for companies seeking to segment their customers.

Airlines: Frequent Flyers versus All Passengers

Casino: High Rollers versus All Guests

to effectively deliver target demographics and maintain compliance. Conducting studies concurrently with IVR combined with phone interviewing reduces the cost of reaching respondents by phone. Some state and local governments can't afford a large benchmark study with all phone interviews. They also may not be able to conduct an IVR-only study and leave out cell phones. Being able to call landlines with IVR and cell phones with live interviewers makes phonebased research available to public policy researchers with smaller budgets.

No More Limits

Stop limiting research design by using outdated notions of technical capabilities and costs. Set budgets, quotas and timelines and then choose the right data collection strategy to meet your goals. Think strategically about data collection and release yourself from traditional technology constraints. Mixing modes, and even mixing vendors, are both more effective now. Modern data collection strategies enable you to field research any way you want and reach the demographics you desire based on their preferences. Technology barriers are breaking down, making multi-mode research very practical. Consider using IVR, Web and phone to accelerate results, increase representative insights and meet budgets. By taking this approach, you will see how the phone is alive and helping to provide powerful, early insights that drive business decisions and reflect public opinion. 🔽

Mary McDougall is president and CEO of CFMC, a software provider to the market research and public opinion polling industry with a key focus on Survox® solutions and the industry-leading Survent® multi-mode survey management platform.

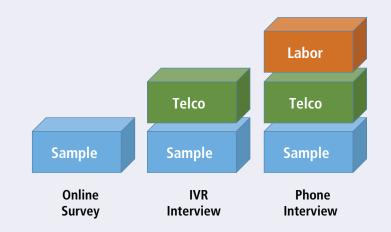
Match Mode With Respondent Value



A Look at the Multi-Mode Research Process

Low-Cost Quota Attainment Mixing

For complete quota attainment within limited budgets, use a combination of the lowercost online or IVR method to cost effectively collect most of the responses, and then flip the sample to phone interviewing to complete quota.



Multi-Mode Operating Platforms

Online, Phone and IVR surveys can generate a single data set of responses for streamlined analysis.

Sample can be shared to deploy multiple modes concurrently or strategically managed to first process the maximum amount of sample through the lower-cost method or IVR can be used to answer a call back or other types of inbound calls, look up the sample record, and then screen, survey or transfer the caller to a live interviewer.

Post-transaction surveys can capture customer satisfaction data when an 800 number to an IVR survey is added to an online survey to maximize feedback.

- 1 Pew Research Center Internet Project Survey, January 9 – 12, 2014.
- 2 Aaron Smith, Older Adults and Technology Use, Pew Research Center, April 3, 2014.
- 3 Matthew Boyle, Aging Boomers Stump Marketers Eyeing 15 Trillion Prize, Bloomberg Business, September 17, 2013.
- 4 Aaron Smith, Older Adults and Technology Use, Usage and Adoption, Pew Research Center, April 3, 2014.



From a business point of view, the size of the wearable medical device market is huge and fast-growing. Estimates predict that it may reach up to \$53 billion worldwide², with 25-35 percent annual growth within the next three years.

The Wearable Medical Device in Your Future...Is Now!

By Morris S. Whitcup, Ph.D. and Keith LaMattina

A wearable medical device may be defined as a biosensor that monitors physiological data, usually with remote/wireless communication, as part of any wearable item that attaches to the body. Activity monitors, smart watches, smart clothing and patches are examples.

Most wearable medical devices to date have been concentrated in the arena of activity and exercise (walking, jogging, or other exercise parameters such as muscle activity) and measure distance traveled, calories burned, heart rate, etc. Some even include GPS monitoring and tracking to enhance accurate measurement of distance.

Other devices encompass a wide range of physiological measurements and, in the future, may incorporate enhanced functionality, including monitoring and/or analysis of:1

- Blood pressure
- Brain activity
- Continuous glucose
- EKG
- Eye tracking
- Hydration

- Infant care
- Ingestion
- Oxygen level
- Pain relief
- Posture
- Radiation exposure
- Respiration
- Skin conductance
- Sleep
- Temperature

Besides consumer and clinical/medical uses, there are also workplace and military applications.

From a business point of view, the size of the wearable medical device market is huge and fast-growing. Estimates predict that it may reach up to \$53 billion worldwide², with 25–35 percent annual growth within the next three years. Smart watches will dominate initial sales within the wearable device category according to many sources, with the Apple Watch accounting for perhaps 40 percent of units shipped.³ Google Glass and smart wristbands may also have billion dollar potential.⁴

What is Inhibiting Growth in the Medical Device Wearable Market?

Several factors inhibit the growth of this market, particularly in the clinical/medical category:

Many consumers see no need for consumer wearable devices or feel that the costs of these devices are unjustifiable given their lifestyle. Greater usefulness and perceived value of the devices – driven by more functionality and standalone capability like being able to operate without a smartphone or other external device – will increase consumer acceptance.

Cost may inhibit growth in the clinical sphere. It is not clear to what extent payers (e.g., insurance companies) will cover such devices.

Perceived inconvenience of the device plus complex usage instructions.

Consumer Privacy and Security Concerns

Challenges in integration of devices and information processing systems. For clinical/medical devices, the information systems



must be able to handle large amounts of data in real time. Paradigms of how patients and their physicians discuss and share information are the only device of this nature to deliver will also have to be changed.

Clinical medical devices need to be highly accurate and reliable, with recording times stretching to a year or more. Better long-lasting micro batteries may need to be developed.

Low consumer adherence/compliance, especially for a device that has to be worn 24/7. Some studies have shown that, within 18 months, fewer than 50 percent continue to use the device. We suspect that the fall-off is even steeper and occurs earlier and that wearing a device on a 24/7 basis may be considered too difficult, interruptive or unreasonable for some consumers.

The difficulty of engineering a consumer device that works for a large-scale population. For example, advanced health features such as EKG, stress monitors, or blood pressure monitors have been cut from the Apple Watch. Although Apple is said to have had meetings with the FDA about these advanced features, engineering challenges are the chief cause of their elimination. The applications supposedly did not perform well on individuals with dry skin and hairy arms. Furthermore, performance varied substantially depending on the fit of the watch on the arm.5

Some Interesting Consumer Devices

Smart watches and advanced versions of these devices will dominate sales. Several devices now available are innovative and worth mentioning.6

Lumbo Lift measures your posture. When you slouch, it vibrates and thus indicates the need to change your body position. The small sensor cube can be worn as a fashion accessory or hidden under clothes. The retail price is around \$100.

Jabra's Heartrate Tracking Earbuds.

The originality of this device lies in the form

factor being earbuds rather than a smart watch. According to the manufacturer, they clinical grade data. It integrates training management and has three fitness tests. The average retail price is under \$200.

Mimo Baby Monitor measures respiration, skin temperature, body position, sleeping and activity of infants. It is washable and you can check on your baby from anywhere in the world. The retail price of the starter kit is around \$200.

Withings Aura Sleep Tracking

Device tracks REM and light sleep, wakeups and total sleep duration and makes suggestions regarding how to improve the quality of your sleep. It also serves as a daytime activity monitor. The retail price is around \$125, depending on the model.

More innovative devices will undoubtedly be introduced in the near future.

What Does the FDA Have to Say About Wearable Devices?

The Food and Drug Administration (FDA), which has regulatory control over medical devices, categorizes wearables into three classes:7

Class I are simple in design and have no potential risk. Examples are tongue depressors, band aids, etc. Such devices must be registered, exhibit proper branding and labeling, and be produced using proper manufacturing techniques.

Class II are more complicated in design and have minimal risk. Examples are x-ray machines, powered wheelchairs and surgical and acupuncture needles.

Class III are intricate in design and have the strictest guidelines because they pose the greatest risk. Examples are implanted pacemakers, heart valves, etc.

Without intending to provide regulatory guidance to anyone, it appears that most of the currently-marketed consumer wearable devices would *not* fall under the regulations set by the FDA and are not marketed as such. For guidance, one is encouraged to consult the FDA database and other appropriate sources of information.

Consumer wearable products that do not need to register with the FDA are in effect considered to be general wellness products; that is, they have an intended use that is related to maintaining or encouraging a general state of health or a healthy activity and are not intended to cure or treat specific illnesses or conditions. They are not presently seen by the FDA as posing any risk to the consumer.

As wearable medical devices become more sophisticated and complex, consumer health and wellness devices may end up in a grey area or beyond and may need to shift to fall under FDA purview.

The FDA has recently issued guidance about general wellness claims for low risk devices.8

Market Research Implications

Device screens, such as those available on smartphones, are currently too small and lack sufficient clarity to serve as vehicles to respond to market research surveys conducted via mobile interviewing platforms. This may change in the future. The iPad and other tablet-style devices have already revolutionized the manner in which online research studies are undertaken. Interactive Voice Response (IVR) surveys can currently be conducted via wearable devices with voice capabilities, but such interviews are inherently limited in what they cover.

Despite these current limitations, the health and wellness information provided by wearable medical devices can be quite usable in clinical and market research applications.

One of the greatest challenges in healthcare is patient adherence/ compliance.9 Lack of patient adherence can potentially lead to increased emergency room visits, hospitalizations and other inefficient uses of the healthcare system. Pharmaceutical companies lose out on sales when patients fail to renew medications on time, follow prescribed dosage or use prescribed medications at all. Estimates of yearly lost revenue for the pharmaceutical industry are \$564 billion worldwide and \$186 billion in the U.S. alone. 10

Much research attention has been paid to addressing lack of patient adherence. Wearable devices can serve as vehicles for measuring adherence in terms of such things as monitoring patient activity, calorie intake, or health-related regimens. Furthermore, reminder messages to help increase adherence can be sent out via wearable medical devices. Using wearable medical devices to identify the more effective adherence programs is a vital healthcare need. It is also possible that, in the future, wearable medical devices will be able to enhance patient adherence. For example, if a device could communicate patients' physiological data directly to their physician, patients may not need to take measurements or keep a log of these levels or track progress over time.

In Summary

Wearable medical devices are a fastexpanding and here-to-stay phenomenon that should be carefully watched for new developments. Although pundits' estimates of market expansion may be over- or understated, wearable medical devices are sure to impact consumer healthcare and medical delivery systems in the very near future. As wearable devices expand in the medical arena (see for example, Apple Researchkit¹¹), increased FDA scrutiny will undoubtedly follow.

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Mobile Schmobile: How to Get in Context Without in Your Face

By Pam Goldfarb Liss





et me start with a statement that may shock you - people are no longer just conversing faceto-face. People are connecting with one another using smartphones and their tablets. Soon, they'll converse using wearables, whether it's smart watches on their wrists (think Dick Tracy or Spider-Man) or with smart clothing such as shirts with built-in communication devices (think Star Trek: Next Generation). Then, there's the "Internet of Things" where the appliances we use everyday will connect us with each other and with all these other tools; that is coming in the very near future, too. All of this is very exciting for qualitative researchers like me who want to find more ways to bring the conversation into every research event.

This new world is finally my kind of place. Conversations are everywhere. Researchers just have to find ways to best use this new technology. We are currently redefining the idea of what this dialogue can be. We can be there with a consumer while an activity is happening to really understand things we've only pre-staged or possibly even missed before.

Let's keep this article focused to the right now of mobile tools - smartphones and tablets. However, I will also address the future tools mentioned above because that future is not so distant any more. Just know that "Mobile Schmobile" is taking us to a new and exciting world of conversations that can bring us in-context with our

consumer without being onsite in what could often be uncomfortable situations. This is a new era that I am enjoying as I use the tools available with a mobile conversation.

The New Conversation: Mobile **Brings New Tools to Face-to-Face**

Conversations are happening everywhere these days - online, in blogs, social media, etc. It doesn't matter if you're there inperson with your subject any more. The meaning of a face-to-face conversation has extended to an any place, any medium connection with smartphones and tablets because:

Video capabilities on smartphones provide a new meaning to face-to-face that allows a respondent to be in the moment anywhere Wi-Fi is accessible.

Texting is another personal connection that gives people a sense of intimacy and allows for a one-on-one conversation via instant messaging format with the added opportunity to post applicable photos and videos of what they see during a conversation without the need for strong

Voice is another tool with smartphones and tablets that can put you in the middle of a store looking at the shelves where products are sitting or in the bar where your respondent is about to drink your beer, so he or she can describe the moment as you listen in and probe about what's happening as it happens.

THE NEW QUALITATIVE RESEARCH CONVERSATION

VIDEO

Self Reported Video Snippets Wi-Fi Enabled Live Video Calls

TEXT/INSTANT CHAT

One-on-One Conversation in Real Time Real Time Chat with Multiple Respondents

VOICE

Real Time Voice Conversation with One or Many Respondents



THE 2 DIFFERENT ROADS TO DRIVE



What's The Difference - Mobile Access? Or Mobile Research?

In qualitative research, there are a variety of providers who talk about "mobile access" and "mobile research," but not too many can qualify how the two differ.

Let me try:

Mobile Access is just a different way that respondents can access an online discussion. A mobile device (tablet or smartphone) acts as the access mechanism to an online bulletin board or focus group chat or webcam chat rather than a lessmobile device like a laptop or desktop computer.

Mobile App Research takes qualitative research literally into the moment with tools such as geo-location or geo-fencing, UPC symbol identification, and other exciting tools that can pinpoint exactly where respondents are, verify usage, and even capture photos, all within a mobile app that fully operates without connectivity, when necessary. Data retrieval then depends on

Mobile

Research

Uses a Mobile

Approach Mobile Qualitative with **Different Expectations**

There are two different ways to look at mobile qualitative research:

later connectivity.

In-Context Learning: Mobile can enable the consumer researcher with exercises that ask the consumer to discuss things while they are happening. Here, the consumers research themselves. For instance, to learn how parents decide whether to bake a cake for their child's birthday or buy one, a mixture of intervention exercises can be implemented around the planning for the special event with actual photos and video supporting their deliberation about the pluses and minuses of each option. As a result, the researcher gains not only insight into their decision, but also photo or video evidence from the consumer as that decision is being made.

Quick In-the-Moment Capture:

This approach brings the researcher into the moment of purchase as events are happening over a period of repeated actions you ask respondents to chronicle. Respondents don't spend time explaining their reasons for doing the things they do, but instead post photos, videos and quick diaries of their actions. This approach can be used with either mobile access or mobile research app. For instance, to learn how teens snack across the day (weekdays and weekends), a mobile diary app might work well. This app could capture photos of teens snacking, confessional videos about snacking behavior, and even texted posts about snacking choices and the reasons behind them.

Good News for Researchers

The great news is that these mobile tools whether it's just mobile access to an online tool or using a mobile research app - place us alongside respondents as they go about

TWO WAYS TO LOOK AT OPPORTUNITIES FOR MOBILE RESEARCH





their daily lives. We can be right there when they do things we might not be able to observe in person from buying sundries to brushing their teeth or hosting their child's birthday party. Although these private moments can be self-reported later, more direct observation via mobile yields more natural and honest results.

Whether you are using mobile as an access mechanism to an online project or using a mobile app, researchers can now go further into consumers' minds than ever before. Mobile can show researchers what consumers do and what they see in real time, not just what they remember after the fact well enough to self-report.

The Future Is Going to Start Even **More Conversations**

Yes, we already know that there are more communication tools coming as the category of wearables and the Internet of Things move us even further into an "always connected" world. These smart watches, smart glasses and even smart appliances will collect data, but the ability to have a conversation with them is where I will keep our conversation.

For qualitative, I believe the future will come in creating conversations with the pictures and videos taken via the following:

Glasses: Available from two manufacturers right now (Sony and the soon-to-return Google Glass), these devices have video chat capabilities dependent on area Wi-Fi to not only conduct a live conversation with a consumer, but to see what they are seeing, even from miles away. Moderators will be able to manage emails or texts from clients watching to probe pertinent questions as the consumer is in the moment of the activity for a real peek into their world. The greatest obstacle that smart glasses face to be used reliably for research involves lack of adequate Wi-Fi in stores and public places.

Smart Watches: These devices are revolutionizing our world as we see smart watches from Apple and Samsung join the wrist-worn, data-centric health trackers that preceded them. Similar to how smartphones became incorporated into consumers' lives, smart watches will become users' primary tools for capturing photos, video, and health statistics (with supporting apps). This information will be captured as an extension of the smartphone in that same self-reporting, observational manner that gives researchers another passive peek into consumers' real lives. The greatest obstacles that smart watches face to be used reliably for research involves initial consumer perception that these devices are too expensive and unnecessary. However,

like smartphones prior to 2007 or tablets prior to 2010, smart watches will be users' primary mobile device by 2020. Mark my words.

Smart Appliances: These new appliances will help consumers shop better for groceries, cook better and do laundry more efficiently by connecting their owners through the Internet to see inside. How such data helps researchers is obvious. But for qualitative researchers who are interested in creating a conversation with these consumers, the impact of smart appliances is still unclear. Perhaps similar to syndicated research that captures grocery store shopping behavior or television viewing habits in aggregate, these smart appliances will offer fodder for decision-making based on appliance usage data. For qualitative research, another possibility is to ask interested smart appliance owners to "optin" and allow their usage information to be accessible to market research recruiters for focus groups and other conversations about products associated with their appliance. This information from smart appliances would allow professional recruiters to find verified product users. It would revolutionize recruiting much like mobile research has revolutionized ethnography. Consumers would be real users and data would verify this. The greatest obstacles that smart appliances face to be used reliably for research involves their rarity and lack of adoption, currently. Only early adopters own the very basic versions of what is coming. My guess is that, in 2025, smart appliances will be integrated in enough homes to be useful research tools.

Our Responsibility As Researchers:

As you can see, there are so many exciting tools available to researchers to connect with respondents in the moment. These tools, however, bring a great deal of responsibility to us as researchers.

I put my research tasks through three simple rules:

Would I Do It? The crucial question every researcher should ask about activities or questions created. If the answer is "no way," then don't ask the respondent to answer or complete the task.

Will This Get Me the Answer I Needed? Mobile provides a very small screen to communicate a task or question. There can be a lot of room for misinterpretation. Be sure your respondents understand what you want to know easily inside the 10 seconds they will have to read it in the moment needed.

Will the Technology Work? Live video streaming inside a store or even video uploading varies a great deal with current Wi-Fi capabilities. If a respondent gets frustrated for even one task, you risk losing their participation for the whole project. Another side effect can be your client's lost trust. Don't try something that is risky. There is always another way to get the same information.

Exciting things are on the horizon for all of us in the research community to learn more than we ever have before. We must be diligent to respect our participating respondents' privacy. We must also be kind to them in always respecting their time and effort and remain aware of the technology's

Respecting our target audience always provides great information and a wonderful conversation, too. I'm excited for this new age in research. And, in the words of Captain Jean Luc Piccard, I'm excited to continue to explore brave new worlds. ▼

Pam Goldfarb Liss is the president/big brain at LitBrains-Igniting Ideas!. As a qualitative researcher, Pam enjoys the neverknow-what's-coming-next thoughts of kids, young adults and moms. She is a 25-year veteran moderator who is happily adapting to meet her often early-adopter consumer where they easily communicate including smartphones, tablets and, soon, wearables.



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WHAT DO PEOPLE **REALLY THINK?**

It's Just Common Sense: Accessing All 5 Senses to Enrich Research Insights By Susan Fader By Susan Fader

In reality, we rely more on our five senses to draw perceptions and form opinions than has been commonly acknowledged



n the push to revolutionize the market research industry's insightgathering process, the primary focus has been on finding and using new technology and platforms to field the research.

But in many cases, we are just migrating the traditional question/answer format to these new technological platforms. This approach overlooks the need to explore moving beyond questions that focus on just accessing the conscious brain. Focus should also be on finding ways to unlock the less-conscious brain and how to integrate all five senses (touch, sight, taste, smell, sound) into our methodological approach in order to gather more powerful insights.

The latest findings in the field of neuroscience and perceptual psychology are strongly suggesting that our historical reliance on the conscious brain for answers is limiting and can sometimes provide misleading information. In reality, we rely more on our five senses to draw perceptions and form opinions than has been commonly acknowledged.

As perceptual psychologist, Lawrence D. Rosenblum points out in his book "See What I'm Saying: The Extraordinary Powers of Our Five Senses":1

Our more conscious brains are busy with trivialities of our day, our less-conscious brains are engaged in much more interesting endeavors. Our less-conscious brains are absorbing a profusion of sights, sounds, and smells using processes that seem superhuman...the brain doesn't much care which sense organ provides information... your brain is constantly reacting to stimuli for which you have little conscious awareness.

So how do we access the less-conscious brains while still gathering verbal and visual feedback?

Use Disrupters

We need to consider stepping back from the straight verbal question/answer structure. Adding disrupters to how we ask people for feedback may appear to run counter to the biblical injunction of not putting a stumbling block before the blind. But, while adding disrupting elements to how we ask and how we want a person to answer may initially make it more difficult to respond, in reality we are actually providing the tools to make it easier for that person to give us richer insights to our questions.

Adding the disrupter as an additional step integrates a non-verbal sensory experience into the question/answer experience, and this expands how people process the question and

www.faculty.ucr.edu/~rosenblu/book/ SeeWhatImSayingBook2/SeeWhatImSayingBook/ Home.html

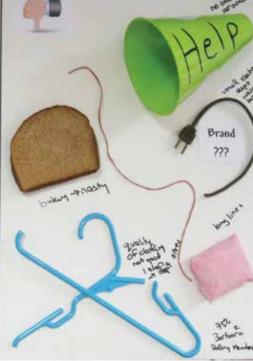
then articulate an answer. Disrupters force people to go outside normal, automatic topof-mind responses that tend to downplay the multi-sensory experiences that shape our perceptions and opinions. By enabling people to access different parts of their lessconscious brains, we are having them better integrate their multi-sensory experiences and perceptions into their feedback.

Disrupters work with just about anyone and they don't require recruiting for creative

Synesthesia Provides a Pathway to Integrating the Other Senses

Synesthesia is the neurological phenomenon where stimulation of one sensory or cognitive pathway leads to automatic, involuntary experiences in a second sensory or cognitive pathway. Below are a few examples that build on integrating synesthesia into how we ask for feedback.







Touch acts as a disrupter and forces people to both process the question and provide feedback more broadly by expanding how they think.

Use Touch as the Trigger

As researchers, we are constantly asking people to provide feedback on how they feel about a product, service, advertisement, etc. Most people use the prism of like/don't like as the starting point and it is sometimes hard for them to get beyond that. But if you have them access touch as the starting point, you will begin to access the lessconscious brain.

Touch acts as a disrupter and forces people to both process the question and provide feedback more broadly by expanding how they think about the multilayers of their perceptions.

To set up this tactile adventure, find fun items that have different textures, shapes and dimensions. Put one item in a drawstring bag so the person can feel, but not see, the item. Each person doing this exercise gets one bag (or, if you have a larger group, you can group people in pairs).

For the pair exercise, one person puts his or her hand into the bag and the other person takes notes. Based on touch - what is being felt, but not seen - the person whose hand is in the bag will rapidly provide one word descriptions of what

they feel (e.g., slimy, sticky, sharp, hot, damp, round, squishy, prickly, etc.). The other person will write down all the words on a sheet of paper. (Note that each group creates its own list and then uses their list and only their list when they answer the upcoming question.)

Try this "touch and describe" exercise before you expose respondents to the subject matter you want to talk about. Once you have introduced the subject matter the product, advertisement or service - have them provide their feedback by initially using their descriptor words. These words will be used as the baseline for developing their thoughts. It doesn't have to be literal. For example, they can build off slimy to convey an uncomfortable feeling or an idea that conveys something that can stick or something for kids (being slimed was an integral part of the old Nickelodeon show "You Can't Do That On Television").

Using Shapes to Capture Feelings and Perception

Another approach involves asking respondents to create line-drawings of a shape that conveys their reactions, thoughts and feelings.

Don't worry if they say they can't draw because the lack of drawing ability doesn't hinder anyone's ability to create a shape. The key to this exercise is focusing on how they feel and not how well they can draw. In fact, sometimes it is easier for them to create the shape without looking at what they are drawing because, by not seeing, they are better focusing on translating what they are feeling into a shape.

Tell them they can make their line drawing as complex or as simple as they want. This exercise works best when you have them create and draw a shape because you are not constraining them to choose from specific shapes. Once they are done, the shape they have drawn can usually telegraph what they are thinking. It is also good to have them verbally explain how the shape represents what they are thinking.

If you feel you need to use training wheels, then provide specific shapes, but realize that standard shapes tend to be much more simplistic and one-dimensional than the shapes that they would create on their own.

If we are asking for their perception of a new shampoo that they have used, or a breakfast cereal they just tasted, or an ad they just saw, we are asking them to start out by using a shape as a platform to convey the complexity of their feelings and perceptions. Isn't it clear which shape conveys harshness?

Smells Act as Window to Emotions

Memories, associations and scents are strongly intertwined. Scent can trigger an emotion and put us in different states of mind and even affect the mood we are in. Think of summer at the beach, a campfire in the mountains, freshly squeezed orange



juice, a bus without air conditioning on the way to summer camp, sitting in a brand new car, or catching a whiff of burnt toast. Each of these scenes conjures a strong, dominant smell and unleashes imagery and an emotional reaction that we have stored in our brains.

Create a list of diverse situations that have strong associated smells. Then, instead of asking how they feel about an idea, ask them to leverage their answer from a dominant scent and describe how that scene/scent combination ties to how they feel about the product or idea.

Think in 3-D

We see the world in 3-D. Yet, when we ask people to create collages, we typically ask them to think and express themselves in a 2-D world. Therefore, they tend to select magazine or Internet photos that are just

literal representations of what they are thinking. But 3-D collaging requires them to step back, think creatively and incorporate sensory perceptions into building their collage. How an item feels, smells or sounds is incorporated into the collage and becomes part of the story.

3-D collaging is something that should be done as pre-work at home since we do not want to give respondents a pile of preselected items. The beauty of this exercise is that they get to find and select whatever items they want to use.

Working with 3-D objects creates an environment where people do an indepth examination of their behavior and attitudes and then translate them into a 3-D environment. For example, a candy wrapper can be used to represent indulgence whereas a condom (or a sanitary napkin)

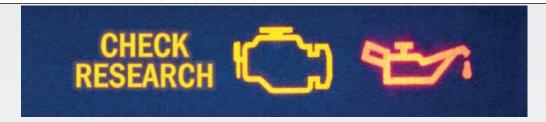
can represent protection. (Even though we never give condoms as an example, it is amazing the number of people who integrate them into their collages.)

Summing Up

These examples are just a few of the disrupters that can be used to access the less-conscious brain. They provide a key to better accessing the five senses that impact how we really experience and think about things. It also helps broaden the tools and the language that people can use to express their feelings and reactions.

In our rush to embrace new technology, remember that we can also better explore ways to help people express what they are observing, feeling and thinking in their lessconscious brain. 🔽

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CEOSUMIT

2015 CEO Summit Recap

MRA's 2015 CEO Summit was held February 8–10 at the Villagio Inn & Spa in Napa. Located on the 23-acre Vintage Estate, the Tuscan-inspired property featuring flowing water fountain pathways and lush Mediterranean-style gardens provided the perfect destination for creativity and learning.

The Summit is an extraordinary event exclusively designed for C-level executives (CEOs, CFOs, COOs, business owners, presidents, etc.) of small to mid-sized marketing research companies. The event challenges thinking, expands knowledge and strengthens businesses. During the event, attendees explore the most pressing leadership issues through keynotes, hot topic presentations and panel discussions. Breakout sessions allow for peer-to-peer discussion and debate on the timeliest topics. Based on survey results and onsite feedback, this year's event was highly regarded as a must-attend event.

"No other conference gives me a forum to learn from my peers like this one. The expert presentations will inspire good ideas when we address C-level challenges in our roundtable discussions."

Steve Schlesinger, PRC, CEO, Schlesinger Associates 2015 MRA CEO Summit Co-Chair















"Great networking. This event provides an excellent opportunity to talk with industry peers to discuss common issues and solutions."

Donna Pickert, President & CEO, PVR Research, Inc.

"It is like paying for a room full of high-end consultants for a couple of days at a lower price than you would pay for a couple hours with just one consultant." Chris Lee, CEO, MedQuery, Inc.

"As a business owner, I am just one person. I don't know everything and the only perspective I have is mine. Having 'outsiders' at the Summit share their knowledge, expertise and perspective helps to give me a different view of my business. Thanks."

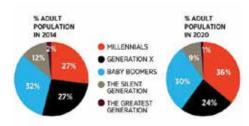
Steve Henke, Founder, Harpeth Marketing





"Next"-Gen Opportunity: **Today's Reality**

Generation Y – also known as Millennials - is broadly defined as the age group born between 1980 and 2000. At 87 million strong in the U.S., they are larger as a group than Baby Boomers (76 million). Millennials will account for one-third of all retail spending within the next five years and will represent more than half of the total workforce. This age group already accounts for \$1.3 trillion in total consumer spending annually.1 Millennial spending is already huge. Today.



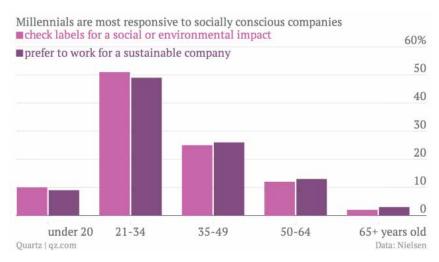
Gaming industry executives often use the term "next-gen" when talking about this demographic, perhaps without fully appreciating the magnitude, scope and proximity of the opportunity they truly represent. The median "middle age" of all Americans today is 37.6 (half older, half younger).2 With the oldest Millennials turning 35 this year, it is critically important to recognize the immediacy of

their influence as disruptors on both the transformation of business as we know it and upon broader consumer behaviors and expectations that span across generations.

At this most interesting and pivotal time, tremendous revenue opportunities exist for the gaming industry, at a most interesting and pivotal time, to modernize offerings in ways that resonate with a very different type of customer. Understanding what makes Millennials tick, with the important caveat of realizing the inherent limitations of broad generalizations (particularly when applied to the most diverse generation ever), is the first step in configuring a new gaming experience designed to appeal to younger consumers without alienating existing casino guests.

At a time when places like the Las Vegas Strip are seeing gambling - as a revenue stream - taking a backseat to non-gaming activities such as dining, entertainment and retail, it is critically important to recognize the influence of Millennial "culture" on this behavior shift. It is essential to understand why Millennials in particular rebuff traditional casino games and layouts and how the industry can respond in ways that meet their needs and expectations.

Millennials are the "social generation"; they are the early adopters of the social media revolution which has forever disrupted communication and commerce as we know it. This generation is always connected, especially via their mobile devices, to their



¹ Barron's, On The Rise, April 2013

² U.S. Census, www.census.gov/2010census/ data

social circles. Gen Y values creativity, engagement and genuineness.3 This is a generation highly skeptical of corporations and traditional marketing tactics. Millennials prefer to do business with companies that, like them, express a societal conscience and they support companies they feel are aligned with their desire to make the world a better and more connected place. Whereas previous generations have been more interested in front-of-the-box product details, Millennials want to know back-of-the-box contents and backstory; they are willing to pay a premium to do business with companies they feel operate transparently and are in line with their values.4

It is also important to recognize that Millennials have come of age during the Great Recession, a detail that is essential in understanding them. This generation likely will not be better off financially than their parents, a first in the U.S. since the Great Depression.⁵ Instead, this generation will leave its mark in a profoundly different way - changing how societies fundamentally communicate, view themselves and measure their collective progress along the way.

OLD CONSUMERS VS. NEW CONSUMERS Total value Lowest price Waiting for solutions Creating their own solutions Asks, "What's in it for me?" Asks, "What's in it for we?" Seeking more stuff Seeking meaningful experiences Trusts marketing messages Looks at ingredients on front of the box on back of the box Passive recipient of Active co-creators of content, brand communications products and experiences ©2011 BBMG

U.S. Millennials are diverse. Only 56 percent are white, compared to 72 percent of Boomers. They also reflect the globalized times of their day with 20 percent having at least one foreign-born parent. These facts help explain their comparative political liberalism on a wide range of social issues.

Millennials are (largely) single. Gen Y is much less likely to be married at the same age as older generations were; only

26 percent of Millennial adults are married. When they were the same age as adult Millennials are now, 36 percent of Gen Xers were married compared to 48 percent of Boomers and 65 percent of the Silent Generation.6

When asked what they perceive as an ideal entertainment environment, Millennials prioritize: free Wi-Fi (71 percent); access to a charging port for my phone (68 percent); allow me to influence/co-create the experience (40 percent); provide a way for me to ask and answer questions (34 percent); demonstrate something good my money is going toward (33 percent); incorporate compelling/interactive online content (28 percent); and connect me to other consumers of this experience (24 percent).7 Millennials are social.

Millennials want to be part of defining the experiences they consume. They are not passive consumers; they are explicitly active participants. This desire to influence an outcome within a highly social and interactive environment is in direct conflict with the traditional layout of casinos, designed as they are around gaming's most significant historical money-maker: slot machines.

> Millennials are not ethically opposed to the concept of gambling, but they also are not enthusiastic about most current casino games and are turned off by the layout of the traditional gaming floor. Gen Y is not looking to "get lost" within a gaming environment; their objective is to seek out a specific type of experience which has already been vetted and validated via social proof within their online network of friends, family and trustworthy

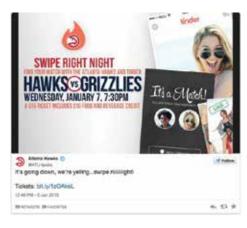
strangers. Environments that are confusing, difficult to navigate or create barriers to transparency and convenience are typically avoided by this consumer group.

Slots in particular are widely viewed by younger consumers as being antisocial, non-intuitive and generally boring. This is in direct contrast to women over age 55, who are much more likely to view a slots (and overall casino) experience as social, engaging and fun.8 Though non-appealing overall with Gen Y, males in particular have pronounced negative feelings about slot machines as being an older-female activity. A lack of variance in prizes may also have something to do with it as this generation would likely spark to incentives beyond purely financial. The opportunity to "win" things that can be shared among friends such as a restaurant credit, spa treatment or bottle service at the property's nightclub may be more of a motivator for Millennials as might a game that siphoned off some of its profits toward a noble cause.9

There is less resistance to table games such as blackjack or poker among Millennials, especially males. Perhaps this is because of a more inherently social experience and the feeling that skill is involved in the game itself. Also, table games continue to be romanticized by Hollywood, keeping them more current in the mindset of younger consumers.

Changes in gaming regulations, specifically changes to allow wagers on skill-based elements, will need to happen to truly reform and permanently align a live casino experience with Millennials' desires and expectations. Until the regulatory environment allows game manufacturers and casino operators to pilot new types of games, the other side of the coin must be prioritized: the casino environment itself, also negatively perceived by Millennial consumers.

To create a gaming environment that Gen Y will want to interact with and feel positive about, it may be best to view the casino itself as a "persona" which can be sculpted (with the direct input and regular, transparent feedback of these younger customers) into something that feels almost like a real person they would want to hang out with. Companies that resonate with Millennials leverage distinctly non-corporate social media personas toward this objective.



⁹ Research of Gen Y casino/IR patrons who don't gamble, mixed methodologies, 2014

³ Forbes, Authenticity: The Way to the Millennial's Heart, August 2014

⁴ Fast Casual, Millennials Willing to Pay More for Better, More Customizable, September 2014

⁵ Huffington Post, Millennials Better Off Than Their Parents? May 2014

⁶ US Chamber Foundation. Millennial Generation Research Review, November 2012

⁷ Survey of 10,000 21-34 year olds, December

⁸ Survey of 3,000 35–65 year olds, September

On January 7, 2015, the NBA's Atlanta Hawks partnered with matchmaking mobile app Tinder on "Swipe Right Night," a promotion aimed directly at Millennials. Tinder is a dating app that presents a few photos and profile basics about other members.

From there, the user swipes right ("yes!") or left ("nope!"). The idea was to invite everyone with the Tinder app to revise their immediate, eligible pool of dating prospects to within less than a one-mile radius. The goal of the promotion, according to the Atlanta Hawks was "to get us to make sense as an entertainment source." beyond basketball, "with a younger demographic of consumers." By most accounts, the promotion was a success and has more teams in the NBA considering a similar initiative.10

Millennials consume leisure activities in a "lean forward" type of way. For Gen Y entertainment, retail and dining experiences are about more than just the unrelated components of those specific categories; they are about the overarching social environments, online and offline.

The main offering of today's casinos, in the minds of Millennials, is its physical space, which they view as being unappealing. Gen Y wants open environments that buzz with a patchwork of passionate conversations, an environment which may feel "too loud" for older

But most of all, Millennials actively seek out environments that foster social collisions.

Thinking Outside the Box (of Slots)

A few years ago, a large company was looking to trim costs. As the company's accounting department carefully examined expenses, one particular bean-counter zeroed in on a line item and thought he had come across an "ah-ha" moment. He excitedly ran into the CEO's office and exclaimed, "Do you realize we spend \$6,000 on coffee, per month? Let's eliminate the free coffee and we'll save \$72,000 per year!"

Of course, eliminating coffee from a break room does not eliminate employees' demand for coffee. After all, it's coffee. If, for argument's sake, the nearest coffee shop was half a block away, many employees would likely leave the office 2-3 times per day (10-15 times per week, 500-780 times per year) to get their java fix. This time out of the office spent chasing down Colombian caffeine is time an employee is off the grid not interacting with co-workers, not talking about projects and not thinking about work.

If anything, companies should expand their "free" offerings to employees because they foster valuable "collisions." ¹¹ Employees who stay "on-campus" to grab a cup of coffee or lunch are interacting with other employees doing the same. While they are doing these things, they are discussing projects, communicating with others outside of their immediate teams, sharing ideas and bonding as a workforce. Their productivity, cohesion and morale increase. In short, they are working. The value of these spontaneous interactions can be difficult to measure, but it's impossible to miss. More companies should consider perks such as free lunches because the ROI is so immense.

A personal task such as "I need to eat lunch; I need to go somewhere to do that" can be systematically engineered by companies to encourage more social collisions in the workplace, but there are many ways this happens less strategically in everyday life.

Another environment that fosters social collisions is also one of the best mediums for professional networking. There is one entry requirement: everyone there must have a child. School functions provide the perfect background for strangers to form a common bond via the shared experiences of their kids. This particular forum is also impactful because it is recurring given that there are many events over a school year.. It is only natural that conversations and relationships, over time, gravitate from talking about what the kids are doing to what the parents are doing. A casual conversation at a soccer game is often the foundation for the development of a key business relationship.

Similarly, dog owners feeling their beloved pet needs communal exercise (they are social animals, right?) might opt to take Fido to the local dog park. Once there, what happens? The dogs mingle...but so do the humans. It is almost impossible to go to a dog park and not meet someone new. The common bond of dog ownership often sparks conversations and sometimes even spawns new interactions, connections and even friendships. Here, as with the workplace coffee example, a primary task paves the way for a much deeper interaction opportunity.

Casinos, however, don't function like break rooms, kids' soccer games or dog parks, do they? There is no real ancillary behavior to which the primary activity of gambling anchors. The odds of a social collision occurring at a slot machine are overwhelmingly bad. Even within a table game environment, there is little interaction taking place not directly related to the

task at hand. A key atmospheric element necessary to foster social collisions - missing from casinos - is related to being able to physically move around a space as one consumes an entertainment offering with others.

Casino gaming floors have traditionally been constructed to segment and steer. As regulatory and technological environments within the gaming industry continue to evolve to better include skill-based games and mobile applications, the physical restrictions of casinos must also be rethought. For new casino properties that have opportunities to capture younger consumers, it would be wise to consider design styles that are more open and communal. Existing facilities may wish to experiment with zones, lounges and other quarantined areas that can be redesigned to better attract Millennials.

Shopping malls were one of the key centers for social collisions in the 1970s-1980s. Casinos largely served that function in the 1990s-2000s. These institutions were highly effective at drawing spend from the most important consumer segments. However, neither in their current form is going to be nearly as effective in drawing spend from Millennials. This is largely because neither venue is physically, nor emotionally, connected to what Gen Y is about and wants in a consumer experience. If malls and casinos aren't attractive places for Millennials to consider spending their time and money, what is? What will emerge as the physical environment that resonates with this age group for the next twenty years? Fortunately, the answer largely exists, in pieces. If applied to a casino gaming environment, it is highly plausible to entice Millennials to visit – but any effort must be geared toward what resonates with this group. There are lessons to be learned from companies who are currently successful at connecting with Gen Y consumers.

Dave & Buster's is a restaurant and arcade that combines multiplayer games (like billiards, skeeball, air hockey and video games) with food and beverage offerings. It is specifically geared toward Millennials looking for a young-adult, kid-free environment. The floorplan is open concept, with a large central space that features community games, some of which allow for up to nine simultaneous players. It is common for guests to arrive in groups of five or more; often guests have made a last minute decision to go to Dave & Buster's via their social networks. 12 On some levels, the Dave & Buster's experience is analogous to a night of bowling with friends. But on a deeper level, its physical environment encourages social collisions among strangers throughout the night that, in

^{11 (}inspired by) Inc., Tony Hsieh's Rule for Success: Maximize Serendipity, January 2013

¹⁰ Bleacher Report, Hawks Tinder Night A Strange Beautiful Success, January 2015

¹² MillennialTravelBlog, August 2013

addition to the difference within the games themselves, would be difficult for a bowling alley to replicate.

Dave & Buster's is essentially a blend of experiences: part arcade, part casual restaurant, part community center and part casino. Further homage to the casino element can be found within Dave & Buster's loyalty program. Customers earn \$10 in game play for every \$100 spent on food, beverage and/or entertainment. As is the case with many casino loyalty programs, customers who sign up for a Dave & Buster's "Power Card" receive \$10 in free play.

Guests go to Dave & Buster's, first and foremost, to hang out with their friends. The games, food and other elements orbit this driving force but at no point overtake it as a primary reason to visit; it's almost background behavior. Because social collisions among those you know and those you don't (yet) are the priority at Dave & Busters, all other elements of the experience follow this core element. Games are multiplayer, interactive and even collaborative. Food options tend to skew toward things guests are likely to share. Customer service is more laid back and casual. And yes, there is free Wi-Fi. Overall, this environment could act as a blueprint for a casino, or at least casino zone, aimed at Millennials.

When the physical environment of a leisure activity and the brand behind it both are in line with core Millennial values, companies can generate huge financial returns. In a recent study of favorite fast-food restaurants among Millennials, Chipotle emerged as the big winner. 13

This finding is interesting in that it means many Millennials are willing to pay a premium over cheaper Mexican fast food choices, like Taco Bell or Del Taco, if they feel they are getting a healthier and more ethically satisfying option. The perceived transparency of Chipotle, as a venue and as a corporation, is also a key ingredient to their success with Gen Y. From a physical perspective, Chipotle restaurants are open spaces where consumers can see all aspects of how food is prepared and can "co-create" their meals via customization choices. From a branding perspective, Chipotle goes to great lengths to reinforce the backstory of where its ingredients come from. Specifically, Chipotle has made a marketplace splash via their "ethical farming" and ingredients "with integrity" campaigns.

Online, Chipotle touts its commitment to fresh, ethical farming. The company's

Chipotle's Millennial penetration is twice that of all older age groups combined. Undoubtedly, the company's sincerity and authenticity, from branding to physical spaces, has been tremendously effective at resonating with Gen Y.

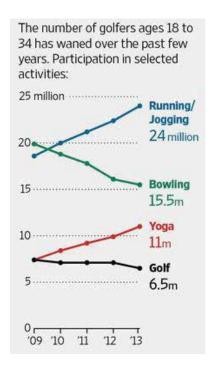
Is there a way for a casino to offer a gambling proposition aimed at Millennials that blends the authenticity and openness of Chipotle with the cooperative and entertaining elements of Dave & Busters?

Casino gambling is one of many activities that has enjoyed historical popularity but is having difficulty generating interest from Millennial consumers. Art Museums can certainly relate to this, as sharply declining attendance figures among 18-35 year olds over the past decade painfully articulates.14

For many Millennials, the notion of going to a museum evokes early-childhood recollections of being dragged around one boring exhibit after another by their Boomer or Gen X parents. Museums haven't traditionally been thought of as cool, fun or particularly social spaces to hang out.

A group in New York City called "Museum Hack" aims to attract Millennials by conducting unconventional, jazzedup tours. Self-described as a "sassy" approach to reinventing what museums have to offer, these tours leverage digital age tools, Millennial-skewed pop-culture and interactivity. The central component of the tour is to provide visitors with an informal - but educational, interactive and entertaining - experience. Tour participants are encouraged to tweet something and post selfies on Instagram. The star of the tour, the art, is introduced in a clever way. The curves of an ancient sculpture might be light-heartedly compared to those of Kim Kardashian. The result of the tour, more often than not, is a newly acquired museum lover who is now energized by an "edu-tainment" experience to come back for more.

When thinking about the types of leisure environments Millennials crave, it is often helpful to look at those they rebuff to see if there are opportunities to turn a traditional experience inside out and attract them without letting go of its core element.



Golf, for example, is another activity of little interest to most Millennials. Participation data shows that Millennials are not going to golf courses, not watching golf on TV and not going to traditional driving ranges. 15 This downward trend has continued among older Millennials as well, demonstrating a possible continued lack of interest as they get older and more affluent.

As with the museum example, an innovative company based in Dallas has had great success with Millennials by transforming a perceived boring experience into what younger people are overwhelmingly responding to. Their effort has been so successfully received that customers often wait 3-4 hours for a chance to experience it.

TopGolf is a modern, fun take on the driving range experience. Aimed squarely at Millennials, TopGolf is part nightclub, part restaurant, part lounge hangout, part recreational center and part driving range. There is a lively, upbeat energy fueled by colliding conversations, laughter, the clanking of golf clubs smacking golf balls and spirited music throughout an open environment that is very easy to navigate and see through.

The game itself has also been made more relevant to a younger crowd. Guests typically play in groups of 4-6, somewhat like a bowling experience, and take turns hitting a modified microchip-infused ball

site also has a section outlining their commitment to philanthropy and provides more information about the quality of life among their livestock and what their "Food With Integrity" tagline means. To further emphasize transparency, there is also a Web cam that shows live feeds of the back of house areas of Chipotle restaurants.

¹⁴ Tronvig Group, Millennials & Museums: Oil & Water? August 2014

¹⁵ The Wall Street Journal, A Game of Golf? Not For Millennials, August 2014

¹³ ABC News, Millennials Boost Chipotle, Defect from McDonald's, August 2014

toward lit-up targets in the outfield. The play experience is simultaneously satisfying to new and avid golfers alike. Because the ball is "smart," players can keep track of their progress in an easy and fun way. While awaiting their turn, individuals relax at nearby tables and consume sharable plates.

Spaces between hitting bays are also open, encouraging social collisions between groups. Beyond the hitting bays at TopGolf, all areas have a community feel that encourages socialization. Even the restaurant component at TopGolf is Millennial-friendly as guests can see into open kitchens, giving a sense of transparency and honesty that so strongly resonates with Gen Y. Comparing the experience of TopGolf to a traditional driving range would be like comparing early blackand-white television to the high-definition programming of today.

By recognizing generational nuances and creating experiences that tap into the behaviors and desires of Millennials, TopGolf has had tremendous success and continues to rapidly expand as a company into new markets. In 2016, TopGolf will open a "Vegas-ized" version in partnership with MGM Resorts adjacent to MGM Grand.

Operators in major markets like Las Vegas recognize the macro trend of both increased visitation by younger consumers and increased spending by Millennials...but on non-gaming offerings. For one of the major gaming companies in Las Vegas, Millennials contributed \$500 million in spend and "almost none of it was on gaming." 16

Because of this shift in visitation demographic and spending behavior. regulators in New Jersey are now allowing games with skill-based elements in New Jersey.¹⁷ Perhaps Nevada is next.

If gaming regulations show flexibility to allow skill-based elements to be wagered upon, there may be an opportunity to "gamblify" live social experiences in the near future, especially those with a presence in gaming jurisdictions like the Las Vegas Strip.

Undoubtedly, the casino games themselves - particularly slots - must change into something that better resembles a truly social and skill-based experience. Perhaps more importantly, the experience must take place within a physical space that spawns the energy and behavior that attracts younger consumers.

A Labor of Like: Making the Gen Y Shortlist

The sheer size and immediacy of the impact consumers under age 35 will have on businesses of all types is enormous. Millennials are driving fundamental, permanent changes in branding, media and entertainment. Already encompassing more Americans than any other generation, Gen Y today represents more than \$1.3 trillion in annual consumer spending, a number set to skyrocket further over the next decade.

As Millennial spending increases, businesses must find new ways to connect with consumers. Understanding what makes Gen Y different - particularly regarding perceptions of self and value - will undoubtedly inspire offerings that leverage innovations in technology, communication and connectivity.

For the gaming industry to become a viable entertainment option for Millennials, fundamental changes to both content and physical environments must be prioritized.

Native American casinos may want to consider highlighting the unique historical and cultural stories of their tribes in ways that allow consumers to participate, collaborate and share experiences via social media channels. This immersion in tribal culture could extend into food and beverage offerings on property. As self-described foodies, younger consumers in particular get excited about discovering different types of

This type of environment, with open, easy-to-navigate spaces that have a vibrant and authentic energy, would likely appeal to

Within a reconfigured casino floor, there could be lounges offering a mix of traditional and new gaming content such as the modified social games on platforms like Gamblit Gaming. However, it is essential that any effort to add culturally relevant offerings must be presented in a way that resonates with Millennials. For example, a museum could have an "edu-tainment" component.

For integrated resorts, like The Mirage Hotel & Casino in Las Vegas, the issue is as much about attracting new customers as it is about the migration of existing Millennials into a gambling proposition. As part of an effort to address this business opportunity, Mirage has placed several large, interactive touch screen tables throughout the property. These InteractivePro™ tables, from Suzo-Happ's SHIFT Interactive, are large tablets and allow for up to four users at a time to share and experience a myriad of connected gaming, entertainment and concierge-type offerings. Recognizing the need to go where the Millennials are (i.e., not the casino floor),

Mirage has smartly been experimenting with placing these tables in non-gaming areas such as coffee shops.

The transition from traditional casino floor layout to one that better fits Millennials should be under current consideration by every operator in the industry. Exactly how and when to pivot toward an offering that is more geared toward Gen Y will vary from property to property.

The Las Vegas Convention and Visitors Authority's 2015 ad campaign, featuring popular American Rock Band Imagine Dragons, is squarely focused on Millennials. The forthcoming iteration of their "What Happens Here, Stays Here" commercial is set at the SLS and MGM Grand and features a man and woman making eye contact in several venues before finally connecting at the Imagine Dragons concert.

Casinos of all types should study younger prospective consumers and contemplate how they can potentially get them to spend money on property via a layout that addresses what they are looking for in a gaming experience. Established properties may want to approach this shift in phases whereby particular sections are redesigned to be more Millennial-friendly. Because the marketplace shift toward Gen Y consumers becoming the dominant consumer group has already begun, it is very important for casino operators to make plans now to engage them.

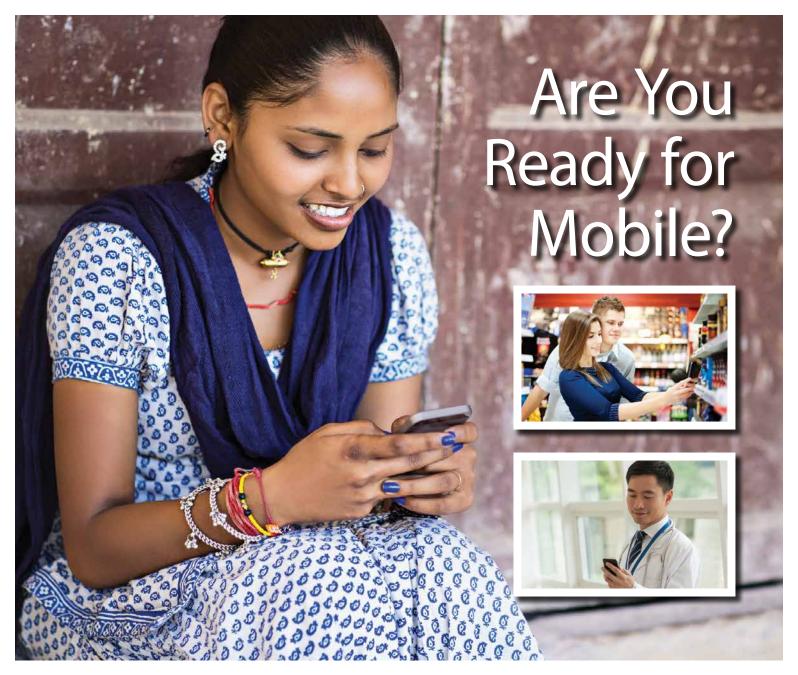
Casino operators must also involve qualified market researchers at the forefront of any development or redesign effort. Because the characteristics, desires and expectations of younger consumers are so radically different than older generations, it would be incredibly risky to guess what they might want.

As this happens, the gaming industry will finally begin to develop an authentic and lasting relationship with Gen Y, its most elusive - and most important - customer of tomorrow, today. 🔽

Roberto Coppola is the global director of market research at YWS and is a seasoned market research professional who is skilled in creative problem-solving and discovering insights gleaned through an open-minded and structured approach using qualitative market research methods. This work has influenced internal and external client understandings of consumer preferences in significant ways that have led to successful market-driven solutions. Roberto holds a BA in English Literature from The George Washington University and an MBA from The University of Southern California. While at GW, Roberto was also an intern at The White House.

¹⁶ Senior Gaming Executive who asked to remain anonymous, Las Vegas, December 2014

¹⁷ Casino Enterprise Magazine, 2015 Gaming Industry Forecast, January 2015



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Let Your Light Shine! Get Your Research Off the Shelf and Into the Press

By Shelly Rose

"Let your light shine so brightly that others can see their way out of the dark." ~Katrina Mayer

ave you ever finished a study, then put it on the proverbial shelf (or more realistically, saved it in the virtual shared drive), never to return to it again? Or emailed a report, given that last presentation, answered a last clarifying email, then received radio silence in return...until the next question came up?

Whether they know it or not, others in your organization and beyond are hungry for the insights you have sitting on your shelf. The key is to understand how to package it so your research goes to work for you. Communicated effectively, a single data point from your latest study can be used to position you and your department or organization as a thought leader, generating buzz about a topic that your stakeholders care about and that matters to the industry at large.

Getting your research off the shelf and into the press offers a variety of benefits, including the opportunity to raise the profile of research and insights within your organization and the chance for individual researchers to build a reputation as an expert on a particular topic. As DIY research tools and user data become more accessible to non-researchers, we need to look for other ways to add value beyond the delivery of traditional insights. This is a fundamental shift from how most researchers and research departments operate today. Before taking a contract within a media agency research department earlier this year, I had always felt very separate from the marketing department and had little to no exposure to the communications team. By making shareability and thought leadership a priority, your research becomes not only a valuable tool for key decisionmaking, but also a springboard to additional opportunities to shine.

In this age of content, many companies have already formalized the practice of communicating insights in a systematic way. Google produces Think With Google,1 a series of articles and videos published by Google execs to share findings from primary research alongside learnings from the broader Google universe of user data and consumer behavior. Yahoo regularly conducts research and publishes articles on its advertising insights website.2

Edwin Wong, senior director of B2B insights at Yahoo, sees the value in sharing new learnings outside of the organization. "We always want to dig a little deeper to get to the next level of understanding when we're researching a new development in the market. We have found that, by sharing what we've uncovered along the way, we become part of a larger conversation with our advertisers that sometimes leads to even more valuable partnerships in the long run."

So how can the rest of us catch up or expand on our existing efforts to get the word out about the important work we're

There will be challenges to overcome. As researchers, we're not trained as corporate communications experts or PR professionals. But by following a few simple steps, we can learn how to either DIY our own PR or make it easy for the communications department to get our research into the communication pipeline.

One way to start thinking like a communications pro is to start every new research project with the end result in mind...not just the answers to specific research questions. While these research questions are crucial, of course, the

¹ www.thinkwithgoogle.com/

² advertising.yahoo.com/Insights/index.htm

resulting communication about them is equally important. We should hypothesize headlines that will get the attention of busy industry executives or members of the target audience who want to hear what we have to say. What will be relevant to those we are trying to reach? What is the ideal story we'd like to be able to tell?

Some companies run similar studies year after year, or on a quarterly basis, on a topic that matters to their audience with the explicit objective of generating buzz. I recently collaborated with a major telecommunications provider to analyze data from a study they had run in several markets to find out how much the average consumer knows about how the Internet really works.

Another company that helps college seniors, recent graduates and grad students find career opportunities based on their field of study conducts an annual study to track the ease with which this group is able to find a job when they're ready and which resources, characteristics and perks have the most influence on their likelihood to apply for a position.

In both of these cases, the goal is to ask enough questions so that if what generated the most buzz last year turns out to be less interesting this time around, there is a good chance you'll be able to uncover something new that people want to hear more about. For example, if people still have low levels of knowledge about how Internet is delivered to their computers, tablets and smartphones, but they suddenly seem to know more about how to prevent hackers and cyber-attacks, that might be the more interesting angle to lead with in your communications this year.

Over time, this library of insights can lead to new insights and can elevate your company to a position of thought leadership.

YuMe, a multi-screen video advertising technology provider based in Redwood City, CA, has taken their communication plan on the road, literally, by conducting a series of research roadshows each year in locations around the U.S. and Europe. These events give them a chance to give key customers and partners a first look at the new insights uncovered in each study. They also provide the sales team with a wealth of information to share with others who are unable to attend the live events.

"We've found that our research roadshow events help us take the conversations we have with our customers to a new level," says Paul Neto, director of research and technical marketing at YuMe. "They appreciate the effort we make to proactively share new insights from the research we're doing and the fact that we're proactively and systematically delving into topics that matter to the industry."

Another challenge to this approach is the proprietary nature of research findings for many primary research projects. By planning ahead, we can incorporate questions that will yield shareable results and generate interest in findings from the larger study.

For example, a recent study for a major digital publisher (see what I mean by proprietary?) uncovered new insights into the way consumers perceive what brands and publishers refer to as "branded content" versus standard video advertisements. We were able to draw some really interesting comparisons between the characteristics consumers associate with standard 30-second ads versus branded content videos (think "Dear Kitten" as an example. although it was not included in the study). The publisher, however, deemed those insights to be best used internally to avoid giving the impression that one type of video is more desirable than the other. We also learned which type of content - funny or educational - was more effective when it came to turning consumers into customers and then into advocates. So instead of putting the entire study away on the shelf, we were able to share this secondary insight externally via a combination of articles, reports and talks at industry events.

The right communication plan for your research department will vary based on many factors – the audience you want to reach, what and why you want to communicate to them, the resources you have to support communications and the frequency with which you want to communicate new insights, just to name a few. Here are some options to consider if you are just getting started:

Cultivate relationships with the right people. Reporters, bloggers and other influencers in your industry will become your new best friends. Reporters are often looking for experts to provide input or quotes for their stories, or for new story ideas. They will welcome a well-written pitch (which is a topic for another day) sent directly via email or Twitter. You can learn about new requests through daily notifications from HARO (Help A Reporter Out). Over time, you can also build a list of bloggers and other influencers who frequently write about relevant topics in your industry and offer to write guest posts or contribute ideas for future posts.

Seek out existing opportunities to get your work published or referenced.

There are industry publications (like this one!) that need content on a regular basis

and conference producers who regularly seek speakers for their next event. And not to completely ignore internal PR opportunities, you can check with the marketing or communications department to see if there is an executive newsletter where you might be able to include a summary of your work. If nothing seems like quite the right fit, you can even start your own blog or publish your stories on LinkedIn.

Go back to your previous studies to see what nuggets you have stored away that you can leverage for future communications. Now that you've identified outlets for your brilliant insights, vou need some content! You likely have reports collecting dust on the virtual shelf or have white papers that can be excerpted for a new blog post or article. Perhaps you did a study a while back on a topic that has come full circle and become relevant again. Or maybe you have conducted a series of disparate studies that all include findings on a single topic that you can summarize in a new report with a set of overarching recommendations.

Develop your own framework for future research communications. Once you've mined archives for relevant stories and insights, you'll want to start working on a way to make the process much easier in the future. Take the time to lay out a set of questions you can ask yourself at the start of every new study to ensure you'll have something amazing to share at the end. Which outlets are most likely to be interested in the findings? Which data points are likely to generate the most interesting insights? How does this relate to something happening in the market right now? Who will be interested in learning about what you have to say?

If you're new to the communications game, start slowly, and don't get discouraged if you don't see results right away. Just like when you were starting out in research, it will take time and experience to find your flow and then things will start to click. In time, you'll have a larger network to rely on, more experience to draw from, a larger library of insights to utilize and you'll get good at predicting which stories and approaches will be the most successful. And that's when your light will really shine!

Shelly Rose founded Creative Insight Services, a strategic marketing research consultancy, in 2013. She specializes in the areas of innovation research, audience profiling and consumer understanding for companies large and small. She can be reached through her website (www.creativeinsightservices) or on LinkedIn (www.linkedin.com/in/shellyrose).



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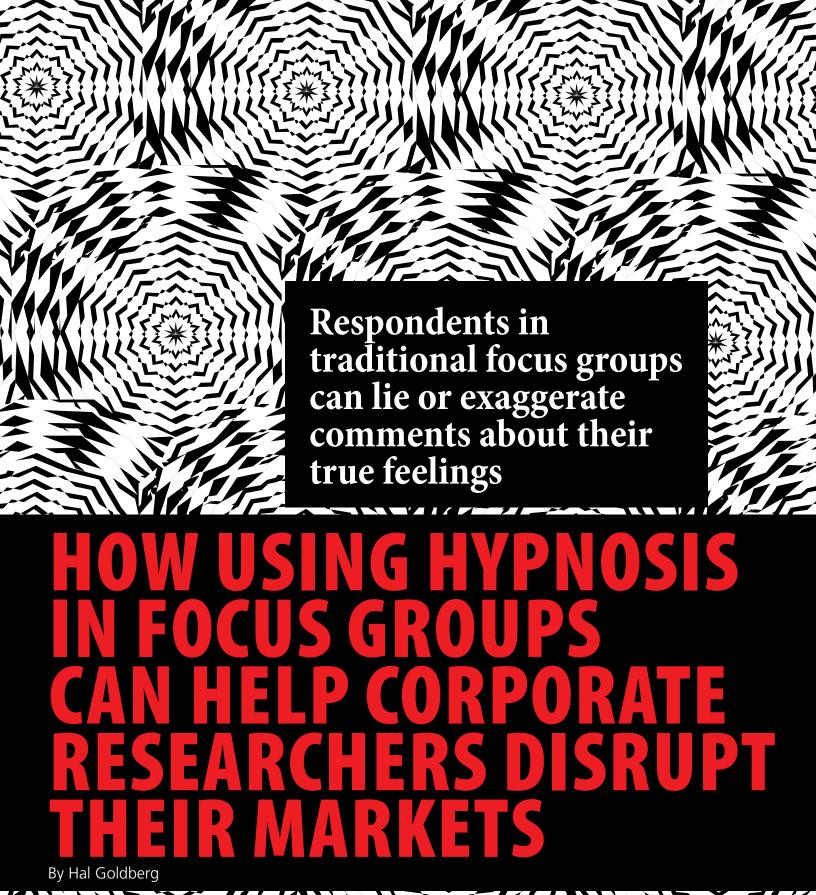
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orporate researchers can develop strategies to disrupt their market by discovering new insights from focus groups using hypnotized respondents. Hypnosis Focus

Groups can provide new insights versus "awake" focus groups by uncovering consumers' subconscious thoughts and emotions. The hypnosis process gets more truthful responses, eliminates "dominant respondent" problems, enhances memories of past events such as advertising, category usage and brand "imprints," elicits greater emotional response, and generates greater respondent creativity and brainstorming.

Problems With Traditional Focus Groups

Traditional awake focus groups cannot generate the truly new insights needed to disrupt the market sufficiently to fix an ailing brand, introduce a new brand or dramatically catapult a brand ahead of competition. As Harvard Business School professor Gerald Zaltman wrote in his influential book *How Customers* Think, "Contrary to conventional wisdom, (traditional focus groups) are not effective when developing and evaluating new product ideas, testing ads, or evaluating brand images." (Zaltman, 2003). The key reasons why traditional focus groups can't give marketers the insights they need to really disrupt their market are as follows.

The dominant respondent

Traditional focus groups tend to become influenced by a dominant respondent (Greenbaum, 2003). When this person's contribution is not challenged by others, this dominant viewpoint emerges from the discussion. In these cases, other opinions within the group may be ignored.

Lack of truthfulness

Respondents in traditional focus groups can lie or exaggerate about their true feelings and what they really believe, especially if they feel their responses will be more palatable in the group environment (FAO, 1997). In addition, respondents in traditional focus groups are reluctant to express their true feelings on sensitive subjects (Mack, 2005).

Poor memories

Respondents in traditional focus groups can have poor memories concerning the topic for discussion. This is not unusual since many of the topics relate to products and services that are not of particularly great importance in their lives (FAO, 1997).

Holding back emotions

Many respondents in traditional focus groups do not understand why they are doing the things they are doing and therefore can't tell you about their emotions. Even if they are in touch with their feelings, they may not be able to express them. And when they do understand their feelings, they may not want to tell you (Silverman, 2014).

Inability to be creative in brainstorming

For the same reasons that respondents will not share their deep-felt emotions or tell the complete truth, they will also not share their most creative ideas when brainstorming - they either can't articulate them or are reluctant or embarrassed about voicing them in a group of strangers. As Professor Gary Schirr has written, "Focus groups continue to be used in innovation efforts to uncover customer needs, generate new product and service ideas, and evaluate decisions, despite extensive empirical evidence that [these] group methods are ineffective for such purposes" (Schirr, 2012).

Using Hypnosis in Focus Groups

The use of hypnosis in focus group research was an outcome of my desire to solve the problems encountered in traditional awake focus groups indicated above. When I developed the technique in 1972, hypnosis was just emerging from its recent acceptance in 1958 by the medical and psychological profession as a therapeutic treatment by the American Medical Association.

However, until recently there was no overall consensus about the scientific foundation for hypnosis. Over the past decade, many university research studies have proven that brain activity with hypnotized subjects differs from that of awake subjects. Professor David Spiegel at Stanford University has shown, using functional magnetic resonance imaging or functional MRI (fMRI) brain scan technology, that altered functional connectivity in the dorsolateral prefrontal cortex and dorsal anterior cingulate cortex in the brain may underlie the physical nature of hypnosis in the brain (Hoeft, 2012).

Beginning in 1972, I started using hypnosis in focus groups. Over the years, I have developed many unique procedures. Following is a description of the basic approach and benefits of the technique.

The Hypnosis Process in **Focus Groups**

During the focus group recruiting, respondents are asked if they would be willing to be hypnotized; on average, 70 percent agree to participate. At the start

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[Respondents] will also not share their most creative ideas when brainstorming - they either can't articulate them or are reluctant or embarrassed about voicing them in a group of strangers.

of the session, the moderator takes the respondents through the hypnosis process as a group. Once the respondents are in the hypnotized state, the moderator proceeds with the topics in the discussion guide. At the end of the session, the moderator brings the respondents back from the hypnotized state to their original awake state.

Preventing Dominant Respondent Problems

At the beginning of the session, respondents are told they must provide their own thoughts and feelings irrespective of what any other respondent has said. No potential dominant respondent is allowed to control the discussion. Therefore, even if the moderator cuts off a respondent's answer because it is not deemed relevant, no one is alienated or upset, and even the shyest respondent in the group is directed to provide information and join the discussion.

Getting at the Truth

The moderator also instructs respondents to tell the truth and provide only completely honest answers. They are instructed not to say things to make the moderator feel good, impress the moderator, or enable themselves to look good in front of the other respondents. In Hypnosis Focus Groups, there is no "yea-saying."

Accessing the Subconscious Mind With Hypnosis

In order to discover new insights compared with traditional awake focus groups, the technique gains access to respondents' subconscious minds where memories and emotions are stored. Professor Joseph LeDoux at New York University has shown that information from the environment is taken in by our senses (eyesight, for example) and is sent first to the thalamus gland and then to the amygdala and hippocampus glands (all found in the brain) where it is stored as a subconscious "memory" (LeDoux, 1996). Research by Professor Daniel Wegner of Harvard University has shown that people have the ability in the hypnotic state to access this subconscious content of their minds and that, "People find that they are able to

control the . . . recall of memory. . . in ways that are not readily available to them when they are not hypnotized" (Wegner, 2002).

The "Age Regression" Process to **Retrieve Memories**

A key element that can help disrupt a market is finding the hidden memories respondents may have about the brands in the market. Because respondents in traditional awake focus groups have poor memories of events that are important to the sponsor of the research, hypnosis memory retrieval can be the solution to this problem.

In order to access respondents' memory banks, the technique of age regression is employed. Age regression is a process whereby the respondent is told to return to an earlier event in their life and recall it. The reason this is possible is because the subconscious is like a computer hard drive that has stored information about every event, person and thing we have experienced in our lives. Under hypnosis, respondents can be directed to specific areas of their subconscious mind to retrieve hidden information. As an example, we may ask respondents to go back to the last time they were shopping for a product and to then tell us what they were doing and why they were buying a particular brand.

The Discovery of Imprints

One of the most important uses of age regression is to uncover product and brand imprints. Konrad Lorenz, an Austrian ethologist, invented the science of imprinting as it related to animal behavior. He found that, for many animals, their first experiences could create imprinted behavior that lasted for the remainder of their lives in research that later earned him a Nobel Prize.

Howard Hoffman, former Professor at Bryn Mawr, wrote that imprints can be a strong influence on human thinking, emotions and behavior (Hoffman, 1996). Professor Timothy Wilson at the University of Virginia pointed out that one of the reasons it is so important to discover the imprints in the subconscious is because the most powerful imprints are usually tagged with a high level of emotional content. It is these emotions that can be

the drivers of our behavior, even more so than our cold, analytical conscious thinking (Wilson, 2002).

With Hypnosis Focus Group research, respondents can be age-regressed back in time to tell us about the very first time they experienced a particular product or brand so we can learn about these imprinted impressions. Once we know the imprints, we can take them into account and design the best strategies to disrupt the market.

Enhancing Emotional Responses

Professor Timothy Wilson has written that emotions protect us from things that make us feel bad and promote things that make us feel good (2002). By using hypnosis in focus groups, it is possible to identify those "feel good" emotions for respondents. A key research study that hypnotized respondents used significantly more emotional and sensual language to describe their purchasing behavior than non-hypnotized respondents (McDonald, 1998).

In Hypnosis Focus Groups, respondents share their true emotions and feelings in connection with their beliefs and actions. The moderator can also deep dive beneath their emotional reactions to find the perceptions and evaluations underlying them by using a special type of "automatic writing." With this technique, respondents are told to visualize a blackboard and to write on it, using a visualized piece of chalk, the words or pictures that describe how they feel about the subject under discussion. They are then asked to explain why they wrote those words or pictures. This technique has been validated by many academic studies as an efficient way to explore the subconscious (LeCron, 1954).

Exploring Brand Personality

Projecting the most motivating brand personality is an important tool in trying to disrupt a market. In traditional groups, moderators try to get respondents to describe the personality of the brand. However, as Jennifer Aaker pointed out in her seminal article, it is very difficult for consumers to do so (Aaker, 1997). And Holly Buchanan has pointed out that it is not the personality of the brand that should be researched, but rather the personality of the potential users, with the goal of having the brand "mirror" the potential user's personality. The goal should be to communicate in a "personality-relevant" style similar to that of the receiver whom you hope to persuade (Buchanan, 2012).

To achieve that goal, Hypnosis Focus Groups use a short-hand version of the Myers-Briggs Type Indicator to explore respondents' personalities in a unique way so that marketers can better appeal to them.

It is not the personality of the brand that should be researched but rather the personality of the potential users with the goal of having the brand "mirror" the potential user's personality.

Respondents choose which Myers-Briggs personality trait best describes users of the brand and then whether or not that trait describes themselves. Once we know how the respondents categorize the brand users and themselves, we are able to better understand not only how personality traits are related to the brand's perception, but also how the brand needs to project itself to current users and potential users.

Enhancing Brainstorming and Creativity

Another key to disrupting the market is getting consumers to come up with new ideas to accomplish that goal. However, respondents in traditional focus groups are usually not very good at brainstorming: they feel inhibited because the environment is too threatening to them, or they feel their ideas will be criticized. The sessions can also be dominated by a single respondent (Brainstorming, 2014). Hypnosis eliminates these problems and as Dr. Stanley Krippner, a leader in creativity research, has written, "Altered states of consciousness (e.g., hypnosis) may prove effective in fostering the creative act because creativity is basically preverbal and unconscious in origin. . . [it] can assist in enabling an individual to conceptualize novel solutions to artistic, technological, and scientific problems" (Krippner, 1965).

Hypnosis Focus Groups use the Hypno-Synectics technique where respondents focus on seemingly disconnected words, images and concepts in order to develop something new and original. The Hypno-Synectics method gets respondents to use non-rational thought processes by "making the strange appear familiar" and by "making the familiar appear strange." The original Synectics method was developed by George M. Prince and William J.J. Gordon at the Arthur D. Little Invention Design Unit in the 1950s (Gordon, 1961).

There are many different Hypno-Synectics exercises that can be used, depending on the goal of the session. The "Direct Analogies" exercise is used to get respondents to break up their existing mindsets. Here we tell respondents to

find some similarity between things that are otherwise dissimilar. In the "Personal Analogy" exercise, respondents are told to become part of the subject of the session. For example, if you were trying to come up with new ways to combat graffiti, they would be told to envision themselves as a spray paint can and then try to come up with ideas to prevent it.

In the Hypno-Synectics technique of role-playing, a respondent might be given the role of Marie Antoinette and told to "get into the role: the costume, the 18th century environment of Paris, etc." and would then be directed to decide which brand of automobile she would buy and why, and then relate that back to the respondent's own viewpoint. Again, by making the familiar into something strange, we come up with a new way to look at the subject.

Case Studies

Since 1972, I have conducted over 1,500 focus groups for many Fortune 500 clients and their advertising agencies in a wide range of categories and for many types of projects. The following brief summaries will give the reader a sense of how hypnosis in focus groups has been used by corporate researchers to disrupt their markets.

Audi

Hypnosis Focus Groups won the ARF 2012 David Ogilvy Award for its work with Audi and its advertising agency. The Audi A6 had struggled to gain a foothold in the U.S. The product was strong - it was recognized by automotive journalists to be the best of the segment - but the brand didn't have the luxury presence or cachet to support the price point. These focus groups used age regression to explore respondents' initial imprinted experiences with Audi and its competitors and how those experiences related to their car-buying needs today. A key finding was that they saw themselves as driving the ever-changing world and always wanting to stay ahead. The A6 campaign built on this concept, and sales rose 53

Nabisco 100 Calorie Pack Snacks

In 2004, Nabisco was concerned about government regulation of snack products that were marketed to children, including Oreos and other cookies and crackers. These products were believed to exacerbate the childhood obesity problems in the U.S. To find a strategic solution to the situation, a series of Hypnosis Focus Groups were conducted with various groups of respondents. The key finding from the focus groups was that respondents felt that the potential obesity problem could be neutralized by having a portion-controlled snack product for their children. The result was the development of the "100 Calorie Pack" line of products, a \$2 billion business for Nabisco.

Cheerwine Soft Drinks

This regional brand built on findings that the Southern soft drink tastes different every time it's consumed. Carolina Beverage Corp. built a marketing strategy around the drink known internally as "the Trickster." The resulting ad campaign was tagged "Born in the South. Raised in a glass," and led to a national distribution agreement with Pepsi that significantly increased sales.

Conclusions

Traditional focus groups using awake respondents can't provide truly new insights to disrupt a market. There are many reasons for this, including the problem of dominant respondents, a reluctance on the part of respondents to provide truthful answers (especially on sensitive subjects), poor memories of events in their lives that are important for the discussion, withholding their emotional feelings so they appear rational, and their inability to come up with creative ideas during brainstorming.

By using hypnotized respondents, these focus group problems can be eliminated. When hypnotized, no respondent is allowed to dominate the group and even the shyest most introverted respondent provides input. And to eliminate misdirection, respondents are told at the start of the group that they must give their truthful and honest answers without regard to what anyone else in the group has said.

Through the process of age regression, hypnosis can retrieve respondents' memories of past events from their subconscious memory banks. These memory imprints can be the driving force behind their current attitudes and purchase motivations. Once these imprints are known, they can form the building blocks for more insightful brand strategies.

When hypnotized, respondents are more willing to provide emotional content since their inhibitions have been reduced; they no longer have a need to appear completely rational. The hypnosis process also uses special techniques like automatic writing to dig down into respondents' emotional lives.

The use of hypnosis in focus groups also provides new insights into the subject of brand personality by using a form of the Myers-Briggs Type Indicator to categorize respondents and their attitudes about brands. The information from this technique enables marketers to better project the positioning of their brand in the

Hypnosis can also make significant improvements over traditional focus groups when creativity exercises and brainstorming are done. Using the Hypno-Synectics technique, respondents are age-regressed to draw on their own past experiences relative to the subject, bypass inhibitions holding back their ideas, and participate in unique brainstorming exercises to address the issues in the session.

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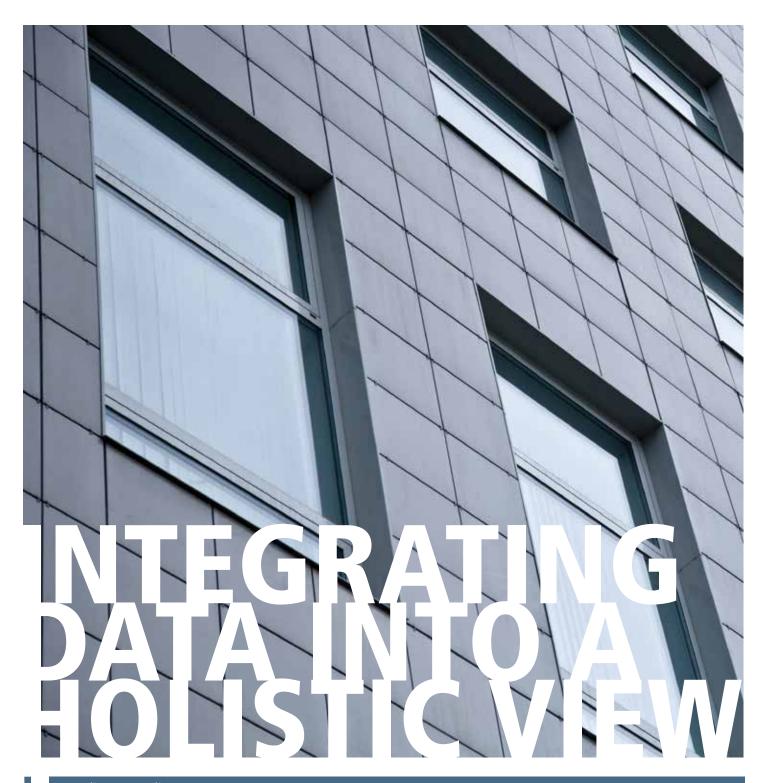
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By Julie Margolis Worwa

Market researchers and their clients face several challenges when incorporating data from multiple sources in order to craft a usable set of action plans. Yet without first creating a plan on how best to harvest the findings from multiple data sources, action plans for the organization may end up suffering from analysis paralysis. This puts researchers in the uncomfortable position of having to justify even more research when prior research initiatives sit on the shelf without being implemented. This article will outline strategies for taking full advantage of market research initiatives from multiple sources in order to create comprehensive action plans that have real results in real market scenarios.

Overview of Issue

Market researchers work in various industries with clients in a multitude of market segments. The one thing we all have in common is that we all have customers! They may be internal stakeholders in our organizations or external clients who have their own internal customers. Either way, we are regularly faced with the challenge of presenting market research findings in ways that enable clients to reach their business objectives.

Often, this involves integrating results from several sources into a unified package of action plans. Many pertinent findings may be evident among prior projects but not all are necessary to the main objective as this image illustrates.



This Florida sign does an effective job of warning passers-by that caution is needed and that the sign has sharp edges which should be avoided. These are worthwhile



messages, but they pale in importance to the footnote that alerts passers-by that the bridge is out ahead! The message with the greatest impact is lost in the fine print.

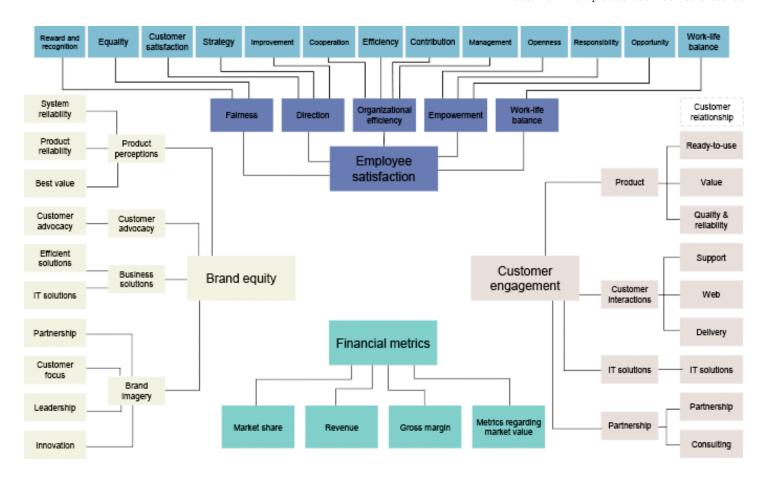
Researchers also encounter situations where we need to pick through various findings in order to find the most pertinent information. Without developing a cohesive and sensible plan to guide the way, we may find ourselves on the road looking out for signs with sharp edges and fall off the bridge.

The best analysis plans aim to link Voice of the Customer (VoC) input to other feedback mechanisms and internal data systems as part of the progress toward integration.

Conceptual and Practical "How To"

Finding the true North in this forest of information requires defining which business objectives the research is to support. Is it sales growth, cost savings or risk reduction to name a few? Priorities must be set from among various choices; consideration of available business solutions must also be incorporated. The action implementation plan is not likely to be adopted if the proposed solution is not realistic in the current business environment.

Organizations tend to do fairly well with these first two tasks and then stumble when looking at the challenge of incorporating data from multiple sources. Each data source



may have several challenges associated

- How complex and complete is the data?
- Where is the data located?
- How is the data formatted?
- What security, quality and governance issues are associated with the data?
- · How does the data illustrate the organization's performance on the key business metrics being explored? Making sense of the different sources

of data requires taking an inventory of the available sources of information. Structured and unstructured data needs to be sorted into categories:

- Financial data about the organization
- Specific data about customers
- Specific data about employees
- Information about operational issues

The diagram below illustrates how one organization parsed their data. They formed four broad categories and drilled down into the details to create a data paradigm to describe their organization.

The integration process begins with understanding the data, identifying key variables and formatting it into a usable structure. Look for commonalities among the data sets, being as granular as possible. Select a unit of analysis such as company, location sites, individuals, households, customer groups, product groups or others.

When integrating data, certain variables may have holes where information may not have been captured consistently. Determine what level of accuracy will be acceptable to your audience and how best to handle missing data from a statistical point of view.

Each source of closed-ended data has specific identifiable variables. Using these variables effectively requires identifying each customer in each source of data. If several identifiers are available, locate or develop a master set of instructions on how they link to each other. Determine whether each source of data has at least one of these identifiers. Identify other available options for linking the sources if primary indicators are missing. Locating these linking variables is critical in being able to effectively merge the data from multiple sources into one analysis file. (Table, below.)

Companies do not need to invest in a completely new Customer Relationship Management (CRM) system in order to effectively integrate multiple sources of information. The primary need is simply a thorough understanding of the information available in each of the diverse sources available.

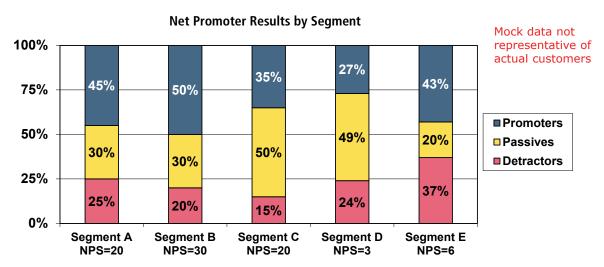
Getting the Answers You Need

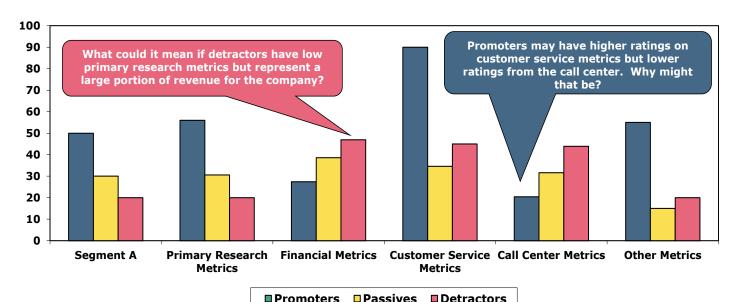
After cleaning and formatting the data sets separately, use a statistical software package with merging criteria to combine the data sets. At this point, set up hypotheses, mine the data to test them and analyze the information.

These are some of the most commonly used data mining techniques:

- Artificial neural networks are non-linear predictive models that learn through training and resemble biological neural networks in structure.
- Decision trees are tree-shaped structures that represent sets of decisions, which generate rules for the classification of a dataset.

Primary Research	Secondary Research	Financial Information	Customer Service Inquiries	Customer Profiles and Demographics	Information from Call Centers	Other Sources of Information
Survey research	Publications	Sales figures	Types of problems experienced	Name	Number of calls before problem resolution	Warranty information
Customer Satisfaction metrics	Literature reviews	Profitability	Frequency of experience	Customer ID	Number of rings before call is answered	Licensing information
Customer Loyalty metrics	Product reviews	Value to company	Severity of problem	Segment	Call Center representative	Customer ID
NPS status	Trade press	Last sales contact	Customer ID	Persona	Customer ID	Other information about customer
Competitor ratings	R&D materials	Date of last sale		Age	Was a manager needed?	
Customer ID	Competitive Intelligence	Customer ID		Tech savvy		





- Examples include Classification and Regression Trees (CART) and Chi Square Automatic Detection (CHAID).
- Genetic algorithms use processes such as genetic combination, mutation, and natural selection in a design based on the concept of evolution.
- Nearest neighbor method classifies each record in a dataset on a combination of the classes of the K record(s) most similar to it in a historical data set (where k 3 1).
- Rule induction involves the extraction of useful if-then rules from data based on statistical significance. Complexity science is based on Chaos Theory of Mathematics and is used to ferret out relationships between unrelated variables.

This simple example involving Net Promoter analysis provides an initial look at which segments are most likely to recommend a company to their colleagues. (See Net Promoter Results by Segment, previous page, bottom.)

In order to get a more holistic view of these customers, examine key drivers by overlaying them on the various sources of data. Positive performance can increase willingness to recommend while negative performance has the opposite effect. Determining which drivers have the greatest impact will help guide you in best serving your customers. (See Key Metrics from Various Information Sources by Segment, top.)

Linking information from different sources can also assist in identifying areas of concern. For example, if Detractors experience slower deliveries (from primary research information) the larger their

orders are (from financial information). they may be less willing to recommend the company. Correcting these issues can be demonstrated to have a quantifiable impact on the company's bottom line.

We are regularly faced with the challenge of presenting market research findings in ways that enable clients to reach their business objectives.

Illustration of Applicability Using Four Case Studies

Acquisition - Growing Market Share

This client is a billion dollar manufacturing company whose equipment is used to transmit data, video and voice signals. They offer network access/transport systems and equipment for tenable carriers to build fiber-optic backbone networks. Customers include incumbent local telephone carriers, cable operators, corporations and government agencies. Their current market share was about 10 percent while the market share leaders enjoyed 3 percent and 25 percent, respectively. The organization reported having difficulty growing market share over their competitors. Although the CEO supported VoC research, middle management provided only lip-service to the concept and senior executives initiated no clear vision or strategy.

This company was using two methods of capturing VoC information:

- Over-arching strategic customer loyalty research program running quarterly
- · Monthly transactional survey for customers who had these types of service experiences:
- Recent installations
- Calls into customer service for hardware or software support
- · Billing issues
- Recent "up-sells" or upgrades initiated by business development staff

We were asked to assist with the deployment and integration of VoC research results into the organization. Developing a holistic data review was part of this process. Historically, resources were not allocated for action implementation and internal financial incentives to change were not instituted. Furthermore, since the organization grew from entrepreneurial roots, they relied heavily on conventional wisdom for decision-making.

Research data clearly indicated areas for improvement and the "research guy" became the "champion of change," instituting a data dashboard of key metrics to educate executives all the way up to the board level. In addition, he identified middle manager owners for process change and worked to secure their cooperation. The CEO began to apply more top-down pressure.

Our involvement was to oversee data integration and mining, conduct senior/ middle management education workshops, steer action planning sessions at all levels, conduct quality functional deployment input sessions, deliver instructional sessions on how to interpret research data and implement action plans based on the



results. We were invited to participate in the strategic planning process and development of specific action planning targets.

The results were quite noticeable! Customer-focused improvements were internalized and implemented, resulting in steady growth in market share. In the first 12 months, the company logged a gain in share of 2 percentage points. In the second year, share increased by another 2.5 percentage points. Currently, share is up yet another 3 points! This overall gain of 7.5 percentage points in market share in just three years is in sharp contrast to flat market share growth in the previous five years.

Service - Improving Performance

This billion dollar company is the leading provider of personal finance, small business accounting and consumer tax preparation software for consumers, accountants and small businesses. Other software offerings include industry-specific accounting and management applications for construction, real estate, retail and wholesale distribution organizations. They also provide payroll services, financial supplies and software for professional tax preparation. This organization has three main business segments: small business, tax and financial institutions.

The company was organized into discrete business units, but VoC listening occurred at the overall corporate level. Corporate leadership sponsored VoC and left it to each individual business unit to implement change. The company wanted one overarching loyalty measure that would define the overall direction of the organization. At the same time, this loyalty measure would have to meet the needs of the individual business units for more information to diagnose product and service performance issues.

The CEO mandated corporate VoC which had a great deal of visibility at the topmost levels of management. However, the needs of each business unit varied greatly and no integrated data solution was being used. Furthermore, no training in continuous improvement methods had been used historically and no plan was in place for appropriate use of VoC data to improve service performance. In addition, VoC data had not been linked to operational processes and standards. Consequently, process improvement goals had not been set and employees had no incentive to implement changes.

Here, we were engaged to communicate the importance of VoC data, improve the

understanding of the data and educate employees about its impact on service improvement. We reframed the existing VoC data with the overlay of information from other internal sources. Training sessions on continuous improvement methods were established, teaching individual business units best practices on how to incorporate VoC data into their strategic planning process. We implemented ongoing customer requirements education at the senior-most level of the organization and created processes for the release of funding to provide employee incentives for implementing service changes.

Subsequent VoC tracking waves indicated significant improvements in customer loyalty driven by improvements in product and service performance. Ratings on specific key metrics improved by 15–25 percentage points. This was possible due to the integration of VoC data being linked to internal business process metrics. The organization is now working on translating these improvements into a 10 percent annual improvement in profitability.

Growth - Eliminating Barriers

This organization is a billion dollar data storage company that owns the lion's share of the market. They make tape drives and automated cartridge libraries, disk arrays and network management/backup software that help businesses and government agencies store and manage large amounts of data. They also offer storage networking products, including third-party hardware devices. Their services range from maintenance and support to consulting and design. The organization sells directly and through Value Added Developers (VADs)/ Value Added Resellers (VARs). They have recently been acquired by a technology company whose specialty is servers and

Despite being the market share leader, company profits had been weak over a number of years due to flat growth. Turnaround efforts included a management shake-up, layoffs and spin-off of its managed storage device business. The company remained committed to its core tape storage products, placing increasing emphasis on selling complementary networking and disk-based storage devices to form Storage Area Networks (SANs). Company executives wanted to increase new customer acquisition.

The growth strategy involved many problems:

- Overall resistance to change within the organization was high.
- Business units operated in silos and through functional domination.
- Very few within the organization knew how to use primary research data.
- Buy-in or commitment to making changes was not easy to secure.
- Due to past deficiencies of information, no direct link had been established between VoC and business results, resulting in no data integration.

Executive leadership also contributed to the challenges:

- The organization had just named a new CEO to replace the top executive.
- The former CEO had systematically disassembled all market listening posts including market research and competitive intelligence.

The new CEO, however, was committed to reestablishing VoC research and other market listening initiatives although incentives for product/service improvements had not yet been established and resources were limited in terms of action implementation. The company was focused on staying afloat.

Again, we were brought in to incorporate the results of VoC into the day-to-day operations of the company. Our first step was to understand all data sources and develop an integration plan. We established VoC listening posts at both strategic and tactical levels and developed intervention

strategies through informational sessions, direct hands-on workshops, and direct communication with the new CEO regarding strategic planning. Our efforts centered on breaking down barriers and resistance to change.

Success came in stages. Our major accomplishment was the establishment of cross-functional implementation teams who translated customer requirements for performance into market-focused process improvements. As growth objectives began to be met, the new CEO attributed much of the improvement to better alignment of functional processes with external customer requirements. This was a direct result of data integration efforts. Revenue has grown year-over-year by at least 10 percent for the last three years and net profits have increased 4-5 percent year-over-year.

[Without] a cohesive and sensible plan...we may find ourselves on the road looking out for signs with sharp edges and fall off the bridge.

Retention - Reducing Churn

This organization is the result of a merger between two leading companies. The combination created a giant that aspired to take on the two market leaders. The company operated a nationwide customer network with more than 50 million subscribers and was valued at \$35 billion. Since the merger, the combined company struggled to drum up and retain new customers and used layoffs in two consecutive years to cut costs.

The merger resulted in technical snags due to each organization using somewhat different technology. The integration of the two companies proved more difficult than anticipated, and the resulting quality problems contributed to customer defections. This company suffered a notable loss when it was excluded from bidding on government contracts worth billions.

The new organization conducted a monthly VoC monitoring program among a myriad of custom research studies. The data appeared to show little movement in the overall indices used to monitor customer lovalty. All levels of the organization supported VoC listening post initiatives; however, the data was not always available to key decision makers at the right times. Furthermore, the data was also used as a stick rather than a carrot. While management supported VoC, no follow-up

for accountability or action implementation was established. In addition, understanding about continuous improvement methods was low. The implications discovered in the data were not clear and provided no strong guidance for reducing churn. Lastly, VoC data was not linked to any other data source or internal business process metric.

We were able to review end-to-end research processes to identify potential areas for improvement and change so that data would be more user-friendly and available for action planning. Part of this process involved a data integration review. We developed communication schemes and conducted workshops on how to gain access to the data and what to do with it once it was available. Action planning and deployment activities incorporated information and actions into the appropriate functional areas. And again, we were invited to participate in the strategic planning process and put forth an ongoing plan of data integration as the company continued to restructure and grow.

During the fiscal year following the process improvement implementations, the overall information services budget had been reduced by 27 percent through a more consolidated approach to running primary research. This research was now directly linked to internal business process metrics. While churn continues to be an issue for this company, the main bleeding of customers has been alleviated. Churn rates have slowed into the single digits from the middouble digits.

These case studies provide illustrations of how integrating data from multiple sources can help to achieve primary business objectives such as acquiring new customers in order to grow market share, improve performance, eliminate barriers to share-ofwallet growth, and reduce churn. \(\nbegin{align*}
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Julie Margolis Worwa is senior research director at Customer Lifecycle and an accomplished, forward-thinking market research professional with over 25 years of experience. She has expertise in all facets of the research process from questionnaire design and respondent interviewing to data analysis and report presentation. Julie is the author of several white papers for Customer Lifecycle which have been published in multiple market research professional journals. Topics of her articles have included predictive segmentation, choice-based analytical techniques such as DCM and Full-Profile Conjoint analysis, and other strategic analysis tools. Please direct all inquiries about this thought piece to: Karin A Ferenz, principal of Customer Lifecycle, 630.412.8989.

Research Legend, Sharon Mutter, PRC, Announces Retirement

Sharon Mutter Field Sources, Inc. in Carmel, Indiana closed its doors January 1, 2015 as Sharon begins her retirement. Sharon has been an active and vital member of MRA for 32 years. In addition to receiving the Honorary Lifetime Membership Award in 2005, Sharon also received MRA's Award of Excellence in 1997, Distinguished Service Award in 1999, and the Great Lakes Chapter Service Award also in 1997.

haron served in every board position with the Great Lakes Chapter as well as serving throughout her career on several MRA national committees. She was the chair of the original MRA vendor exposition, and also started the MRA buddy program at national conferences. Sharon began her marketing research career at Walker Research (now known as Walker Information) in Indianapolis in 1979, and was the national field director until opening Sharon Mutter Field Sources in 1994.

Sharon has made hundreds of friends throughout her years of service and will continue those friendships in her retirement. (Some of the people, to name but a few, who she considers to have been integral to her career in marketing research include: Frank Walker, Ann Cox, Joan Garvey, Chris Everett, Emily Barber, Priscilla Kamrath, Audry Bowen, Patrick Galloway, Elisa Galloway, Jane Reckner, Susan Taylor, Leonard Homer, Ruth Nelson, Judy Hominy, Christine Adams, Howard Gershowitz, Don Marek, Mimi Nichols, Linda Tessar, Susan Adelman, Ellen Gregory, Colleen Moore-Mezler, Merrill Shugoll, Liz Bloom, Anndel Martin and Jerry Carter.) She would particularly like to thank the Great Lakes Chapter for 32 wonderful years of being a member and for allowing her to be its president in 1994 and to serve as an advisor to the board for over 10 years.

Sharon will be saying her final farewell at MRA's June ISC conference in San Diego, so please take the time to wish her well. (You can't miss her as she'll be riding that now famous red scooter!) She will certainly be missed, but MRA and many long-time supporters wish her a wonderful retirement, filled with health and happy days. We reached out to only a small smattering of her many industry friends who, in turn, wanted to share some special memories and

Don Marek, former executive director, Marketing Research Institute International (MRII):

"Sharon is one of my dearest MRA friends. In 1997, when I was President-Elect of MRA, Sharon asked me to place her on the November MRA Board Agenda right

before its Fall Conference in Baltimore, MD. Sharon wanted to present an offer to run a Great Lakes Chapter-like trade show for MRA at its two big conferences. (Having gotten in the way of her campaign for an expanded Alert! at the previous Spring Conference, I wisely agreed to sponsor her request.) At the Board meeting, Sharon's proposal was simple - she and other Great Lakes Chapter volunteers would run a table-top trade show for MRA at its national conferences. All trade show work would be done by volunteers and the exhibit hall would make money for MRA. For reasons I still do not understand, the staff opposed Sharon's proposal. However, Sharon and I were able to convince the Board that an exhibit hall was a good idea. As a result, MRA had its first exhibit hall and Sharon and I became friends for life. Sharon is a very good and persuasive MRA member. Once at a conference, I was in a group that got into a cab with a very surly cabbie. Sharon sat in the front seat and I could see her thinking about ways to win the cab driver over. In our 10-minute ride, Sharon gently prodded the driver into a discussion. By the time we arrived at our destination, the cab driver seemed convinced that she was his best friend. The marketing research industry and I will miss Sharon Mutter. In fact, I will use my Indi-500 bucket list item as an excuse to see her. I encourage all of you to do the same thing."

Patrick Galloway, vice president consulting services and Elisa Galloway, president, Galloway Research Services:

"If anyone can be called the Queen Mother of Fielding, it is Sharon Mutter. To a generation of researchers Sharon has exemplified the best qualities one could ask for in a client. She was tough and demanding when it came to meeting her clients' expectations. She brought out the best in us. She was also insightful and understanding when it came to firsthand experience with the challenges faced by her field partners. For those of us who worked with her, she was a kindred spirit. Sharon's cheerfulness, intelligence, wit and unflappable enthusiasm have made her the Sara Lee of the MRA... 'nobody doesn't like Sharon Mutter.' Cheers to you, Sharon, on a

distinguished and fruitful career. May your home always be too small to hold all the people who love you."

Susan Adelman, president, Adelman Research Group - A SurveyService Company:

"At many MRA conferences, you could see me as well as others looking for Sharon Mutter, holder of the blue GLC wheels to get our cherished wheel to stick on our badges to show that we were proud members of the Great Lakes Chapter of MRA. The challenge was finding Sharon, who was always on the move, but all you had to do was look for a crowd of people and there she would be, happily handing out the blue GLC Wheel.

Nothing kept Sharon back, not even attending MRA meetings in a wheelchair after her various knee or hip surgeries. She was always there with the same energy, greeting everyone with her warmth and

I had the pleasure of working with and learning from Sharon since she was with Walker Research. That continued after she founded her own company on both a professional and volunteer level.

Sharon has always been the consummate research professional, always willing to share her knowledge and help others. Sharon has made her mark on the research industry, a mark that will remain intact for a very long time, just as did the blue GLC wheel we stuck on our badges, reminding us of Sharon, her example, and her comittment to the Great Lakes Chapter, the industry and MRA."

Merrill Shugoll, PRC, president, Shugoll Research:

"I was taught that the key to professional success is finding a mentor and an inspiration. For me, I found both in the great Sharon Mutter. She freely passes on her wisdom about the biz to others, she shows dedication to our professional associations, particularly the MRA and, most importantly, she encourages all of us with kindness and her magnificent smile to achieve our very best. In short, she has been a fantastic mentor and inspiration for me as well as all my colleagues! Congrats on your retirement Sharon!" 🔼

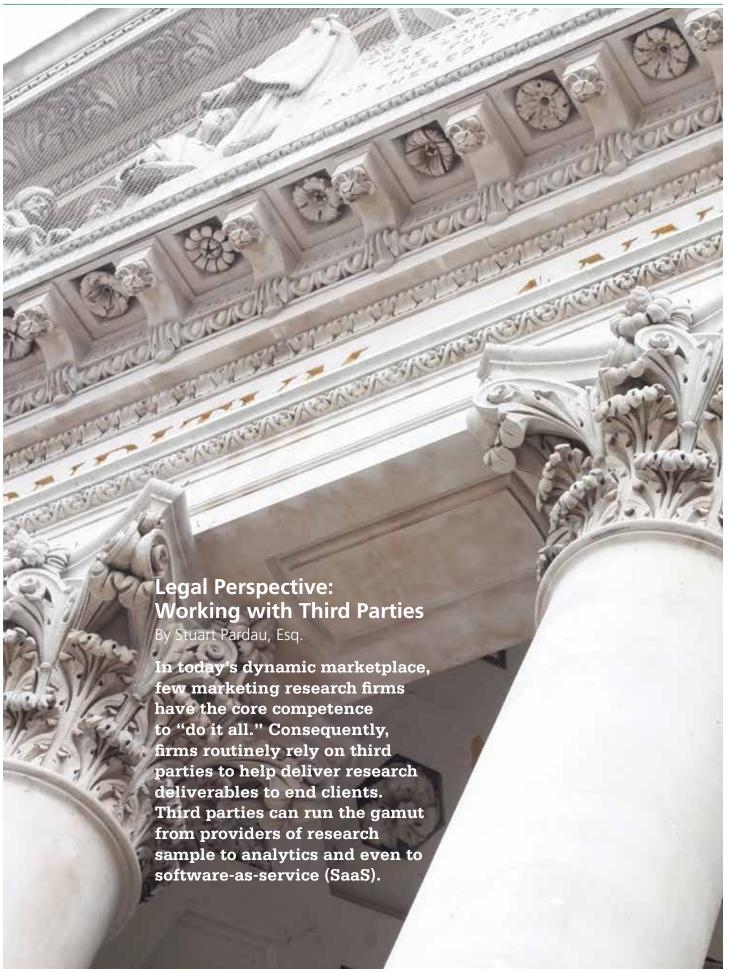












hatever the service, these providers can go by any number of names: vendor, supplier, contractor, subcontractor, collaborator or strategic ally. For purposes of this article, the phrase "supplier" will be used.

In the rush to get the deliverable to the end client, important items can be overlooked. At or near the top of that list is the failure to review the terms of the boilerplate agreement your research supplier gave you or, even worse, failure to put an agreement into place at all.

Why should we care?

In the vast majority of circumstances, even when using a supplier's form agreement (or operating without a formal agreement of any kind), nothing bad happens. The supplier provides us with an acceptable and timely deliverable. We incorporate that deliverable into the services to our client who is happy and pays us on time. We pay our third party supplier. Everyone is taken care of.

However, it is for those rarer instances when things go sideways that we count our blessings in having a solid contract with the appropriate contractual protections. Think of it as insurance. The likelihood that you will get into a major car accident may not be high, but that does not mean it is reasonable to go without car insurance.

From a client-relations perspective, your supplier's screw up is your screw up. You may be doing everything perfectly from a project execution perspective, but if your sample provider has provided you with bad or incomplete sample, it will be of little solace to you that you were not the source of the problem. Your client will still see it as an issue...and a negative reflection on your organization. And as much as you may try to deflect attention, the bulls-eye will still be on you.

From a legal perspective, your supplier's incompetency is also your incompetency. Whether it is in writing or not, once you agree to do a project for a client, you have a "contract." Failure to deliver on what was promised exposes you to potential breach of contract action. No matter the extent to which your "service failure" is the result of faulty third party supplier contribution, you remain liable; they can still come after you. Your likely - and primary - recourse is to go back to your supplier and seek some kind of recovery.

In every agreement with a supplier, you should be mindful of including the following terms:

1. Description of Project Deliverables. A clear and accurate description of

- project deliverables, with corresponding milestones and service level requirements, is an absolute must.
- 2. Fees. A clear and accurate statement of fees is essential. Under no circumstance should you pay for all or even a large chunk of the fees prior to the date of delivery of the services. Ideally, you want to hold back most or all of the fees until services are delivered to your satisfaction
- 3. **Term/Termination**. Most agreements should have a fixed term, with a start and end date (i.e., 12 months, etc.). All agreements should have mechanisms for early termination in the event of a breach by either party. In the context of supplier agreements, it is strongly suggested to have what is known as a "termination for convenience." Such provisions mean that, even though you may, for example, have a two-year agreement, you can at any time cut the supplier loose with, say, 30 days advance notice. This gives you the flexibility as the "client" of the supplier to make adjustments as circumstances may change.
- 4. Confidentiality and Data Security/ Privacy. Your supplier should keep all confidential information that you share with them strictly confidential. Additionally, contractual protections are required to ensure all personally identifiable information that is handled by the supplier is adequately protected and that the supplier has reasonable and proper data security measures in place. Given the high costs associated with addressing data breaches, negotiating strong provisions in this area is essential.
- 5. Representations and Warranties. Often referred to as "reps and warranties," these are statements wherein the supplier lists a series of things it does or will do such as "I am complying with all applicable laws, rules and regulations." These are valuable to have since the supplier is contractually listing all the items they adhere to. To the extent the supplier says they are doing something but fails to actually do it, they are in breach of contract.
- 6. Indemnity. This essentially functions as a "guarantee" of sorts. That is, the party providing the indemnity is agreeing that, if there is a claim against you, they will pick up your legal fees and pay for any claim settlement or damage award. An indemnity, therefore, can be a highly valuable thing to receive. The frequently negotiated point lies around the scope or parameter of the indemnity. In terms of the indemnity one seeks from their

- suppliers, it is beneficial to go as broad as possible, obtaining indemnities for claims arising out of any act or omission by supplier related to the agreement.
- 7. **Insurance**. It is essential that all of your suppliers carry liability insurance. General Liability policies are held by most companies, but the insurance that is probably most relevant is an Errors and Omissions (E&O) Policy. A certificate of insurance should be requested and you should ask to be added as an additional insured
- 8. **Limitation of Liability**. From a risk management perspective, it is essential to limit as much of your financial liability as possible. As its name suggests, a limitation of liability clause contractually specifies an aggregate "cap" or limit of liability under the contract. As a purchaser of research services, you will want to limit your liability as much as possible (perhaps to the amount of fees paid under the agreement) but have a much larger cap (or even no cap at all) with respect to your supplier's conduct.
- 9. Choice of Law/Venue. Contracts typically specify which state law will govern the agreement and, if a dispute occurs, the location of courts where a case would be heard. This becomes relevant if, say, you are a company based in New York, but the contract you signed is governed by Alabama law and requires you to adjudicate in Alabama if there is a dispute. Needless to say, wherever possible, you want to have the agreement governed by a body of law that you are most familiar with and want cases to be heard in your "home court."

The above list is by no means comprehensive, but rather a checklist with some basic summary information that can help keep you out of trouble. It is preferable to have your own standard form, but you can use this checklist to review and possibly modify terms in any agreement your supplier provides. It is perfectly appropriate as a "client" to present your supplier with a form and request them to use your agreement. Any type of further analysis of these legal terms should be reviewed by your own independent legal counsel. V

MRA General Counsel Stuart L.

Pardau, Esq. is a partner at the Law Offices of Stuart L. Pardau & Associates. Prior to launching his own practice, he served as chief legal counsel for J.D. Power and Associates for nearly a decade, developing a deep understanding of the legal challenges facing the research profession. He can be reached at Stuart@PardauLaw.com or 310.948.0861.

The MR Industry Remembering Larry Gold

Laurence (Larry) Gold, the former publisher of market research industry journal "Inside Research," has died at the age of 80 after a battle with cancer.



ith the passing in March of such an industry legend, MRA reached out to a number of other industry veterans to provide their thoughts on him as a journalist, a researcher and a man.

Bill MacElroy, chairman, Socratic Technologies: "Larry was a great observer of life. He was always in his investigative reporting mode, challenging both the status quo and agents of change alike. He

chided the successful and was a driver of continuous improvement and innovation in our industry. In the late 1990s, he told me 'this Internet thing will be a short-lived fad.' I didn't always agree with him, but I liked Larry. I'll miss him."

Reg Baker, executive director, Marketing Research Institute International (MRII): "From time to time, I have been called a curmudgeon because of my disdain for much of the hype about the latest research

method that promised to completely transform MR. Whenever I would meet up with Larry at a conference, he would ask me what I thought about what we were hearing and more often than not took the same dim view. Two grumpy old men. I will miss those little chats."

Jim Bryson, CEO, 20|20 Research: "Larry was a pioneering voice for our industry. 'Inside Research' was widely read for its insights into the marketing research industry and Larry's ability to identify trends. Larry's presence and voice will be missed."

Tony Jarvis, research architect, Olympic Media Consultancy: "The market and media research industry is unquestionably less informed about itself and its business without the crisp, comprehensive monthly news compendium that was 'Inside Research.' Expressing a sincere thanks to you, Larry and Jack, for such an amazing run seems totally inadequate. That you had such a short time to enjoy your retirement is so terribly sad. Few in our research industry have deserved our gratitude more for the 'inside' business insights you provided for so long."

Communications: "Larry was a friendly competitor for over 20 years; we mutually respected each other – and I told him when he discontinued 'Inside Research' last September that someone needed to take the mantle of industry curmudgeon. I guess it could be left to me by default, but I will never do it as well as he did, or with the 'it's for the good of the industry' attitude that he brought to it. Larry was a trusted reporter and journalist of the first order. I was always impressed how he refused to participate

in conference sessions, roundtables, etc. because he did not see that as the proper

Jeffrey Henning, president,

role for a journalist."

Bob Lederer, owner, RFL

Researchscape International: "Larry was passionate about the research industry and was always generous with me in sharing his time and knowledge. And he was always patient with me when I didn't get back to him as quickly as I should have. I'm deeply saddened that he did not get to enjoy a long and well-earned retirement. We lost him too soon."

Tod Johnson, chairman and CEO, the NPD Group: "Over the years, Larry has been



my competitor, good friend, and respected seer of what was going on in the market research business. Working with Jack Honomichl and then taking over 'Inside Research' made him a key player in the industry. He will certainly be missed, but he will not be forgotten for all that he has done for this industry."

Bob Moran, partner, Brunswick Group: "Larry's knowledge of the business of consumer insights was unparalleled. Whenever I'd meet him for coffee or pick his brain at an industry event, I came away from the discussion with layer upon layer of knowledge. I greatly valued his sage advice and (always) kind counsel. A great light has gone out."

Joel Rubinson, president, Rubinson Partners: "Larry had a gravitational pull. I sought him out at conferences and sought his insight on various issues. Larry's impact was not just on a business or an employee; it was on a whole industry. Larry was also a very pleasant person to spend an evening with. I had dinner with him once many years ago that was so enjoyable and relaxed, I remember it to this day."

Jon Last, president, Sports & Leisure Research Group: "Larry was always one that could be relied upon to provide a candid, pragmatic, no-holds-barred perspective on the idiosyncrasies of our industry. Personally, I always enjoyed the forum that he provided to speak my mind and challenge a lot of the hyperbole found elsewhere."

Merrill Dubrow, president & CEO, M/A/R/C Research: "Over the years, I have always enjoyed reading 'Inside Research' and speaking with Larry at industry conferences. Without question, Larry had his hand on the pulse of the market research industry and was always available to share his knowledge with so many people."

Kristin Luck, founder, Kristin Luck Consulting: "'Inside Research' has been THE industry news source for many years. Larry was a great advocate and mentor for me throughout my career. He sat in the front row of my very first conference presentation and afterward I asked him how he thought it went. He said, 'It was the first time I've seen someone present so eloquently while chewing gum.' Lesson learned. Larry's insights and feedback, both one on one and in the industry at large, have been invaluable to me. He will be sorely missed."

Don Marek, former executive director, Marketing Research Institute International (MRII): "In the nine years I was at MRII, I grew to know Larry Gold as we were both regulars on the marketing research conference circuit. 'Inside Research' provided excellent industry information and statistics. Larry very much valued marketing research education and supported the University of Georgia's online Principles of Marketing Research courses. At the last ARF conference I attended in New York City before I retired, I had the privilege of sitting and talking to him for a long time about a wide range of topics from the state of our industry to personal matters. Despite his many achievements, the most important thing about Larry was he was a nice guy. Like the rest of the industry, I will miss him very much."

Kevin Lonnie, president, KL Communications: "Paraphrasing a recurring conversation we used to share: Larry would ask me what I thought of conference X. I'd tell him I thought it was OK, but I wasn't sure how many takeaways I was leaving with. Larry would respond that the conference stunk - 'A bunch of rehashed ideas masquerading as change agents.' I will miss his directness and total candor."

Dan Foreman, chairman of the board, Zappistore: "I grew up in this industry reading with interest the Honomichl report and always looked forward to reading and hearing Larry's views. Influential beyond any meaningful measure, he will be greatly missed and his foundational work will continue, I hope, for many generations. RIP."

Annie Pettit, chief research officer, Peanut Labs: "It's a sad time for our industry. Reports can be replaced, but people can't."

Gian Fulgoni, cofounder and chairman emeritus, Comscore: "I knew Larry for 40 years and, along with many others, I will miss him. He was, first and foremost, a market researcher. In the 70s, I remember him working at MRCA analyzing diary panel data. In the 80s, he worked at Nielsen where he ran a service called ERIM that used POS scanners to collect purchase data and competed with IRI's BehaviorScan service. Later, Jack Honomichl recruited Larry to manage the 'Inside Research' newsletter. With his research knowledge and industry contacts, Larry was able to help Jack build 'Inside Research' into the preeminent publication for market researchers. Now Larry, Jack and the newsletter are each gone and the market research industry is the poorer for it."

Jude Olinger, CEO, the Olinger Group: "Larry was a fixture at market research industry conferences and I always made an effort to seek him out for his point of view on the state of our industry. He always had a position on the health of the industry and I felt like I needed to hear it...even when I didn't want to hear it! I knew that Larry and Jack cast a wide net and that they had a unique pulse on our industry that no one else had. We lost a wise (and informed) voice."

David Almy, CEO, the Marketing Research Association (MRA): "It is of course impossible to condense down to a few words Larry's remarkable contributions. To me, he was patient, optimistic, helpful, candid and wise. He also was open to new ideas while at the same time played the smiling skeptic really well. That perspective is valuable in any profession, but Larry's brand of it already is missed. In this work, he played a key role in advancing marketing research over many decades, from which all benefited. I will miss him."

7 KEYS TO BECOMING A MASTER NEGOTIATOR

By Eldonna Lewis-Fernandez

hile even the word
"negotiation" can evoke fear,
stress and anxiety for many,
the intent is quite simple:
to discuss and ultimately agree on a deal.
Whether it's a multimillion dollar contract or
just deciding where to meet for lunch, life is
rife with negotiations. And, the negotiation
process is a lot like a chess game where
strategy reigns supreme – one thoughtfully
considered move at a time. Make a careless,
short-sighted, ill-conceived move and suffer
the perilous consequences.

Even when faced with the most daunting of deals, regarding the act of negotiation as a "game" may alleviate the apprehension and give you the confidence to make power plays that will ultimately facilitate your desired result. Unlike strategy games like chess, however, the most effective deals are a winner-winner proposition rather than winner-loser.

To help individuals maximize their bargaining prowess in business and life, below are seven critical strategies for emerging victorious in any negotiation:

Project confidence through preparedness

Many people think they need to show a certain kind of confidence, like being loud, bold or brazen, to successfully negotiate a deal. Others think that a lot of experience is required to be a good negotiator. Most of the time, it merely takes tenacity and good old preparation to ensure that you are aptly equipped to assert mutually desirable terms, anticipate objections and discern what motivators or "hot buttons" will resonate with your opponent. Projecting confidence also means having heart, which is endearing to others whether or not you have years of negotiation experience. This can also result in the opposition having a less defensive stance, making them more amenable to your stipulations. Projecting a notable level of confidence, and backing that up with solid, well-researched information, will help ensure that you

Understand that everything is negotiable

When you think like a negotiator, everything is negotiable! It's a mindset you have to operate from in order to become not just a good negotiator, but a great one. When you decide that the terms for anything can be changed in your favor, a world of opportunity presents. Of course, as with most things in life, there will be rules to adhere to with each deal on the table, rules which are needed to evade chaos and keep discussions on track. However, even rules

are negotiable! They can be modified if you simply propose an ethical, viable and mutually beneficial alternative solution. Powerful negotiators are rule breakers!

Create a strong foundation by building relationships first

This is probably one of the most important things an individual can do in regard to negotiation and business in general. Perhaps you have attended the standard "networking" event where you give dozens of cards out without having a real conversation with anyone. It's time to slow down and start making real connections with people – particularly those you might have business dealings with later on. Find out something about them and their lives. Get personal. Much useful information can be gleaned during casual conversation, including what they value in life, what motivates them, what annoys them, their ethics, etc. Find out something about them, personally, and not just their business. You might be surprised how well you can leverage what you learn through a genuine conversation with someone.

It's a mindset you have to operate from in order to become not just a good negotiator, but a great one.

Ask for what you want

There is one key truth in negotiations: you must ask for what you want. Sounds simple enough, but in practice it can often be daunting. People naturally fear rejection or were taught not to be "greedy" as children, so we instinctually refrain from asking for things in life. However, in business. rejection is never personal - it's merely a reflection that you did not present a viable argument substantiating why you should get what you want. If you hear "no," it's the offer that is being rejected, not you, so keep emotions in check and re-calibrate your approach. "No" often just reflects a need for more information, so take heart in knowing that people say "no" an average of three times before they say "yes." It is important to understand that, if you don't ask, you don't get and that the only way to master the art of rejection is to get rejected and keep asking. When negotiating, make it a priority to ask for exactly what you want. Most of the time, you will either receive what you want or an acceptable alternative.

Use the power of silence

Talking too much is a sure-fire way to kill a deal. Have you ever been offered a product or service, but then the salesperson kept talking until he or she talked you right out of the purchase? If they would have simply asked for the sale and stopped talking, their chance for success would have increased significantly. Never underestimate the power of silence. There's an old adage that says "he or she who speaks next loses." When discussing a deal, if you simply stop talking and get comfortable with the awkwardness of silence, your ability to win your argument, sell the product or get a concession in the negotiation increases significantly.

Document everything

The importance of getting the final agreement in writing cannot be stressed enough. Even better, consult with a contracts attorney to review contractual documents or any that require a signature. The purpose of a written agreement or contract is to provide protection for both sides and alleviate any ambiguity of terms. A myriad of problems can occur when the terms of a deal are not put in writing because what you "think" the other party said and what they "think" you said can be two very different things. Documenting the agreement eliminates such perception problems and protects the interests of all parties involved.

Understand exactly what you are signing

Before you sign on the dotted line, it is imperative that you read what you are signing – no matter how large of a packet. Modern life is fast-paced and people are usually engaged in multiple things at once, making it difficult to focus and causing some to sign legal documents without reading them first. The result can be nothing short of disastrous. Make sure you read any agreement or contract in full, to ensure that you are not confirming terms you will regret and cannot undo.

If you are a seasoned negotiator or you avoid wheeling and dealing with people altogether, you will vastly improve your results and be motivated to "get in the game" by knowing how to avoid these prime pitfalls. Whether seeking to gain advantages in your business or personal life, the art of "thinking like a negotiator" will profoundly impact your ability to actualize your desired outcome.

Eldonna Lewis-Fernandez is a veteran negotiation and contracts expert and author of "Think Like a Negotiator." She has more than 30 years of experience crafting killer deals both stateside and internationally and is currently the CEO of Dynamic Vision International.

In Memoriam – The Passing of **Adrienne Goldbaum**

Adrienne Goldbaum passed away January 30, 2015 at age 83. She was a longtime resident of Oxnard and is survived by her sons Edward (Jennifer) and Steven (Teri) as well as eight Grandchildren. Adrienne was the co-founder of LA Research, Inc. in 1978 and several other offices in Riverside and Orange County, Houston and Las Vegas. She worked tirelessly for both the Southern California and Southwest Chapters of the MRA, volunteering her time and planning amazing events. Adrienne had a largerthan-life personality and loved telling jokes and dancing around the office. She will be missed.

Dapresy, Market Intelligence and Insight Software Firm, Sees **Significant Growth; Adds Seventh Global Office in Toronto**

March 30, 2015 - Dapresy announced its seventh global office, located in Toronto, Canada, headed up by Jonathon Ware, vice president, business development, Canada. The newest office reflects Dapresy's commitment to the important Canadian market. In addition to this milestone, and spurred by rapid market adoption of several solutions, the company has also recently opened offices in London, Brisbane and Berlin.

Finn Partners Hires Agency Research **Director Christopher Lawrence**

March 23, 2015 - Finn Partners has announced the appointment of Christopher Lawrence as the agency's director of research. Lawrence is responsible for continuing to grow the agency's research practice and will play a key role in leading new business development and traditional and online communications strategies on a global basis. Lawrence's areas of expertise include branding and reputation management, developing research plans and proposals, program evaluation and tracking, large multinational research projects, client satisfaction surveys and employee communications research. He will be located in the Finn Partners' Washington, DC office and will be teamed with Matt Price, deputy research director.

Marketing Workshop Hires New Senior Research Manager

March 17, 2015 - U.S.-based research and consulting firm Marketing Workshop (MW) announced the hiring of Sherri Kindlmann, senior research manager. With over 18 years of industry experience, Kindlmann brings expertise in all phases of custom marketing research. Her expertise covers a wide range of domestic and international industries. In her new role, Sherri will focus on day-to-day management of research studies including consulting, questionnaire design, sample and field management, analytics, reporting and general client services.

SSI Announces Agreement to Acquire MRops Assets

March 16, 2015 - SSI has entered into a definitive agreement to purchase the majority of assets of MRops, a provider of end-to-end market research operations services to management consulting firms and market research agencies. Founded in January 2007, MRops specializes in business-to-business research, executive interviewing, statistical services and sampling solutions. The company has approximately 200 employees across offices in North America, Asia and Europe. SSI's acquisition of MRops will also expand SSI's leadership footprint in the Asia Pacific region with the addition of an operations hub in Hyderabad, India. The deal is expected to close in first quarter of 2015.

Research Now Announces Appointments within its Client Development Team

March 5, 2015 - Research Now Group, Inc. announced the appointment of five key new members to its Client Development Team. This new group will heighten the focus on adding value to clients and operations in key industry verticals including CPG, retail and financial services:

Kris Baker, vice president of client development, based in Plano, Texas. Baker will manage the company's client portfolio teams in the east and southeast regions. Bart Roselli, vice president of client development, based in Cincinnati. Roselli will lead Research Now's Retail Practice while managing a large portfolio of additional client teams. Mike Gasper, vice president of business development, based in New York City. Gasper spent 20 years at Nielsen and managed some of the company's largest portfolio companies including Kraft. Most recently, he owned and operated The MDG Group, an executive recruiting firm. Chawntae Applegate, senior director of client development, based in Cincinnati. Applegate will lead the company's CPG

Practice Group. **Tom Greco**, senior director of the company's consumer panels and communities division, based in Cincinnati. Greco will be responsible for leading client engagements in this high growth technology

Directions Research Announces Two New Hires

February, 2015 - Directions Research, Inc. (DRI) has hired Lisa Evans as vice president of client service. She joins DRI with 12 years of global qualitative and quantitative research experience. In her new role, Evans is responsible for building strategic partnerships, managing tactical and strategic research engagements, and helping to effectively communicate the results to clients. Margaret Becker has been hired as a senior project manager with four years of experience. In her new role, Becker manages projects from questionnaire design through final reporting. She is involved with estimating, data collection, development of field materials, field progress monitoring, tabulation planning and assisting with analytic needs and cost management.

Research Now Appoints Doug Pierce Senior Vice President of Client Development

February 26, 2015 - Research Now Group, Inc. announced the appointment of **Doug Pierce** to senior vice president of client development. In his new role, Pierce will manage a significant portion of the Research Now sales team and will focus on building the business in existing markets while helping to develop and grow opportunities across new verticals.

Critical Research Purchases RSM

February 25, 2015 - Critical Research, a London-based full service agency, announced the purchase of RSM. The acquisition will allow Critical Research to offer clients global research solutions, covering all major markets across Europe, Middle East, Asia Pacific, America and Latin America. The existing research team and support staff will remain in their current roles. Please direct questions to Patrick Fraser (patrick.fraser@critical.co.uk) or Alexis Pamboris (alexis@rsmresearch.com).

E-Tabs Client Growth Leads to Team **Expansion**

February 25, 2014 – E-Tabs, a provider of market research data visualization, charting and automated reporting solutions, announced two hires to their Bureau and Support Departments. Rob Hastings and Bryan Dankwa participated in a year-long apprenticeship program with the company to help gain a Level 3 Diploma in ICT Professional Competence as well as handson IT and E-Tabs support experience. The apprenticeship proved successful as they have now both received permanent positions with E-Tabs.

Tim Taylor Joins Discuss.io Team

February 24, 2015 - Discuss.io, a solution company for on-demand qualitative research, welcomes Tim Taylor to the team as vice president of business development. A seasoned industry professional with a background in corporate research and as a research supplier, Taylor identifies opportunities and finds strategic alliances to further the explosive growth of Discuss.io services.

Portland-Based MDC Research Opens New VuPoint San Francisco Office

February 16, 2015 - MDC Research, a full service market research firm based in Portland, announced the opening of a new office in South San Francisco, CA. Falling under MDC's VuPoint Research brand, the new office offers a state-of-the-art focus group facility with one of the largest qualitative research rooms in the area. The grand opening of the new location was March 5, 2015.

Guidepoint Acquires Innosquared

February 12, 2015 - Guidepoint, a global research services firm that connects investment professionals and business decision-makers with independent experts, announced that it has acquired Innosquared, a Germany-based expert network with a strong presence in continental Europe. The acquisition, complementing multiple years of strong organic growth at Guidepoint, is a sign of the value of expert networks for the investment, advisory, market research and business strategy communities. It also marks Guidepoint's return to the acquisition market. In 2009, the company purchased Vista Research from Standard & Poor's.

BKV Hires Dr. Beverly Wright, Ph.D., **PRC**

February 11, 2015 - Atlanta advertising agency BKV hired Dr. Beverly Wright to lead the analytics team. Dr. Wright brings over 20 years of marketing research and analytics experience from corporate, consulting and academia to her new role at BKV. In her consultative role for both nonprofits and for-profit businesses, she solved critical issues through the use of modeling and advanced analytics. In her role at BKV, Dr. Wright will work with client teams to advance the application of analytics, help discover business objectives and encourage data-driven decisions through analytics and insights.

Research Now Announces Changes to Executive Leadership Team

February 11, 2015 - Following a strong year of growth and expansion, Research Now Group, Inc. announced promotions and legacy executive leadership team changes: John Rothwell has been promoted from managing director of the Americas and divisional president of Research Now Technologies to chief operating officer of the global business. Kathy Rowley has been promoted from senior vice president of legal and human resources to chief human resources officer and general counsel. Melanie Courtright has been promoted from senior vice president of client services for the Americas to executive vice president of global client services. Chris Dubreuil will join the executive leadership team (ELT) in an expanded role as managing director of Northern Europe. Ben Hogg has been promoted to managing director of Northern Europe, sales. Marc Smaluhn joins the ELT after being promoted from managing director of Central Europe to managing director of Continental Europe. Ed Russo joins the ELT, being promoted from senior vice president of marketing for the Americas to senior vice president of global marketing. Ryan Jantz joins the ELT after being promoted from vice president of corporate development to senior vice president of panels and partnerships.

Dirk Hobgood joins the ELT after being promoted from vice president of risk management and compliance to senior vice president of data privacy and portfolio businesses.

Ameritest Launches Brand Consulting Division

February 4, 2015 - Ameritest, a communication research company, is leveraging a 25-year track record of measuring the effectiveness of advertising into a brand consulting division that will help clients define what their brands stand for and show them how to bring them to life visually and verbally. The new business unit will be based in Chicago and led by 30-year brand marketing/strategy/research expert, Ralph Blessing, whose prior experience includes SC Johnson, Helene Curtis, Unilever and GfK.

Focus Forward, LLC Announces Appointment of Dave Pataki and Beth Carey Fuller

February 3, 2015 - Focus Forward, LLC announced the appointment of **Dave** Pataki to executive vice president and Beth Carey Fuller to director of qualitative services. Pataki has over 20 years of marketing and operations experience in the consumer packaged goods, consultancy and healthcare industries. For the past year, he has served as vice president, transcription services. Carey Fuller brings 14 years of experience in market research, has served as president of the Market Research Association's Philadelphia Chapter and most recently was director of global logistics at Veros Advisors.

Marketing Workshop Hires New Vice President of Client Services

February 3, 2015 – U.S.-based research and consulting firm Marketing Workshop (MW) announced the hiring of Alec Schendzelos as vice president client services. With over 20 years of industry experience, he brings a deep background in all phases of custom marketing research. In his new role, Schendzelos will focus on consulting, business development, research design, analytics and general client services. He will also be responsible for account team management, recruiting and R&D initiatives.

Lori Kolde Announces Opening of New Field Services Company

February 2, 2015 - Lori Kolde announced the opening of Lori Kolde Research Mgmt, LLC, which is now conducting qualitative and quantitative field services nationwide, including recruiting, project management, ethnographies, individual interviews, online interviews and data analysis. Kolde has been in the research industry for more than 20 years and is very active in the MRA, currently holding the position of presidentelect of the Great Lakes Chapter. She can be reached at lori@lorikolderesearchmgmt.com.

Numerous New Hires and Promotions at Cint

January 29, 2105 - In line with its continued focus on the North American market, global market research solutions provider Cint is gearing up for further growth. In a role where her vast experience and deep understanding of client needs will further increase Cint's customer base, Alison Whitmire has been promoted from sales director to vice president of sales for the West Coast. The move allows Alison to impact a broader client base and use her experience on a larger number of employees. Other promotions include Sales Directors Steve Zawada and Andrew **Jones** (both formerly sales associates) and Katie Gazzuollo, who became the U.S. supply sales manager. Also, the Cint U.S. team welcomes **Matt Brand** and Jay Steffey as sales directors, Marketing Specialist ${f Mark\ Andrews}$ and ${f Michael}$ Patiero as a project manager.

Research Now Announces Changes to Shareholder Group

January 26, 2015 - Research Now Group, Inc. announced that it has entered into a definitive agreement with Court Square Capital Partners, an independent private equity firm, to acquire interests in the company from a group of selling shareholders. Under President and CEO Kurt Knapton's leadership, the existing management team will remain in place and continue to grow the business. Financial terms of the transaction have not been disclosed.

Environics Analytics Acquires the Business and Assets of SM Research

January 20, 2015 - Environics Analytics (EA) announced that it has acquired the business and assets of Sampling Modelling & Research Technologies, Inc. (SM Research).

Under terms of the agreement, SM Research will continue offering its longstanding services in targeted sample and data hygiene. The SM Research team is joining the Toronto-based EA staff. Over time, the two teams will explore synergies and opportunities to develop new data and analytics products to meet the changing needs of the market. Specifically, the SM Research data hygiene services will be integrated into EA's product and services suite. Additionally, EA data will now be available to further refine the targeting of sample acquired from SM Research.

Ugam Strengthens Business Development and Services Team

January 20, 2015 - Ugam, a global company in managed analytics, announced the addition of three senior members to its business development and services team. Industry veterans Robert Clark, Angela Park and Sau Lam bring years of market research industry knowledge and deep domain expertise to Ugam, strengthening the company's commitment to delivering process- and technology-led research operations solutions for market research firms. Clark joins Ugam as a business strategy consultant, Park as a sales director and Lam as a client director. All three will work closely with Ugam's leadership team and clients.

India's Datawise Acquires B2B Market Research Firm ComSim

January 16, 2015 - Datawise Management Services Pvt. Ltd, Hyderabad, India, a consulting business analytics and IT solutions service provider, announced that it has acquired ComSim, Inc., a Fairfield, Connecticut-based company through a stock purchase. ComSim specializes in B2B market research for high technology companies. The acquisition of ComSim will help Datawise deliver high quality analytics solutions to its customers across the geographies of the U.S., Europe, Middle East, and India and enable greater market penetration.

Wayne McCullough Elected President of the MRII Board of

January 14, 2015 - The Board of the Marketing Research Institute International (MRII) has elected Wayne R. McCullough, managing director of the office for health equity and inclusion at the University of Michigan Health System, as Board President for 2015. He succeeds Barry Watson, CEO of Environics Research Group Ltd, who now becomes Immediate Past President. The Board also elected Lisa Courtade, head of global market research at Merck, as President-Elect and Bart Weiner, principal at BW Consulting, as Treasurer. Weiner replaces Michael Halberstam, chairman at Interviewing Service of America.

Full Circle Expands Sales Force with Hiring of Jennifer Philips

January 7, 2015 - Full Circle Research Co. announced that **Jennifer Philips** has joined the organization in the role of northeast regional sales director. Philips most recently served as director of research solutions at uSamp, where she was responsible for new business development, business intelligence acquisition and strategic consultation. Prior to that, she spent more than eight years at Survey Sampling International (SSI), rising from project manager to national account manager, focusing on project management and strategy.

MR Industry Veteran Jake Sedlock Joins CivicScience's Exec Team

January 6, 2015 - CivicScience announced that market research industry veteran Jake $egin{aligned} \textbf{Sedlock} \ \text{has joined as vice president of} \end{aligned}$ client development and will be responsible for increasing the company's market presence through strategic sales and expanded client relationships. Sedlock's previous senior executive experience is vast and includes positions with Penn Schoen Berland, BAV Consulting, Hall & Partners, GfK, Lightspeed GMI and Gartner.

BrainJuicer Promotes From Within for Americas and European Growth

January 6, 2015 - As BrainJuicer Group PLC (AIM: BJU) celebrates its 15th birthday, it also announced internal promotions in the Americas and Europe to support further growth in 2015 and beyond. In the U.S., Alex Hunt, formerly EVP U.S., assumes the role of president, the Americas, based out of New York and becomes a part of BrainJuicer's executive management team. The new Latin American Miami office will be led by Gabriel Aleixo, former managing director, Brazil, who will oversee LATAM operations. **Brent Snider**, formerly EVP, Eastern Region, U.S., will assume the role of president, North America, with responsibility for all U.S. teams. In Europe, Mark Johnson, formerly managing director, Continental Europe, will assume leadership of all European teams including the UK and also becomes a member of the executive management team. In the UK, David Whitelam, formerly senior client director, will be promoted to managing director, UK. 🔨

"...a roadmap of what lies ahead."







June 3-5, 2015 SAN DIEGO

ISC concentrates in depth on practical, applicable skills researchers can leverage today while revealing a compelling roadmap of what lies ahead.

Five world-class keynotes and four highly curated educational tracks center on the future, consumer insights, specialty research and tech demos. More than 50 exhibitors will showcase new innovations and approaches. Combined, ISC is a phenomenally target-rich opportunity for education and networking that makes it the singular resource to advance your career, your team and your company.

Optionally, new all-day training sessions the day before ISC offer expert instruction on some of marketing research's most popular skills and tools. For those who register for both ISC and training, a bundled discount offers fantastic value.

The 2015 Insights & Strategies Conference is produced by the Marketing Research Association, which is dedicated solely to furthering the growth of marketing research. MRA's total reinvestment of all revenues back into our profession directly enriches your career and those of other researchers like you.

Join us!

ABOUT





Our Keynote Speakers

While our breakout sessions are focused on MR solutions for tomorrow (developing roadmaps to tackle Big Data, understanding UX design and testing, improving community research, the pros and cons of empathy, figuring out how to measure new media, etc.), our keynotes come from beyond the marketing research industry to shed light on new consumers, data and technologies affecting MR.

The five faces you see below are those of world class experts in innovation, trends, demographics, facial recognition and analyzing the social Web who could challenge - or inspire! - your future.



ASHISH SONI

Dress sharp! We're about to introduce you to technology you've never met before. Ashish Soni is a faculty member and executive director of digital innovation at the USC Viterbi School of Engineering, where he helps engineering students transform their ideas into successful businesses. At ISC, he'll talk about how high tech entrepreneurship, user experience design and innovation play out in MR. Keynote sponsored by QuesterTM.



DR. JENNIFER GOLBECK

As director of the Human-Computer Interaction Lab at the University of Maryland and author of *Analyzing the Social Web*, Dr. Jennifer Golbeck approaches research from a computer science perspective. Golbeck's discovered fascinating and surprising correlations between Internet *Likes*, *Shares* and consumer behavior in the real world – new insights that can guide effective marketing strategies.



JEREMY GUTSCHE

Jeremy Gutsche is an innovation expert and the CEO of Trend Hunter, the world's most popular trend spotting website and research lab. His brand new five star book – Better and Faster – is #1 on Amazon's Business Research & Development list. Gutsche will teach you to overcome three evolutionary traps that block innovation through six repeatable shortcuts to deploy better ideas, faster.



JOEL KOTKIN

An internationally-recognized authority on global, economic, political and social trends, Joel Kotkin is the author of the new book *The New Class Conflict*, which describes the changing dynamics of class in America. Kotkin will announce new research findings which illustrate how demographic shifts are moving your markets and how merging social communities will evolve in the years ahead.



DAN HILL

A facial coding expert and authority on the role of emotions in consumer and employee behavior, Dan Hill runs Sensory Logic, a scientific insights firm that analyzes consumers' expressions to help companies better navigate emotional decisions. Hill will detail how emotional data related to messaging, brand equity and purchase intent can reveal the best actionable insights.



When was the last time you set aside a full day to study one MR topic in depth?

It's been awhile, hasn't it?

For the first time, MRA has partnered with Research Rockstar and Paul Kirch to bring you four optional all-day courses the day before MRA's 2015 Insights & Strategies Conference. They are:

- » Online Qualitative Research Methods
- » Questionnaire Design 201 Scale Selection
- » Behavioral Economics for Market Researchers
- » Selling With Influence

Each course includes a total of 7 hours of live instruction, examples, demonstrations, exercises, real-time Q&A, 1:1 instructor access and a completion certificate. The courses will be taught at the San Diego Hilton Bayfront from 9 AM until 4 PM on June 2, 2015. Lunch is included.

Save \$150! Per student fee is \$499 with a \$150 bundled discount if you register for both ISC and one course at the same time. Register online at isc.marketingresearch.org/register.



Online Qualitative Research Methods Research Rockstar

Do you want to broaden the number of online research methods at your disposal? Topics in this all-day power program include social media research, crowdsourcing (idea management and prediction market platforms), social network sampling, webcam research, and more. Includes examples, demonstrations and exercises.

Questionnaire Design 201 – Scale Selection

Research Rockstar

Market Researchers with some survey design experience quickly learn that scale choices are a critical part of the process. The choice, wording and formatting of different scales can have a huge impact on a project's success. Are the scales too complicated? Are they precise enough to yield actionable information? Will they encourage honest, candid responses? Survey research has many forms of risk. Social desirability issues, acquiescence bias, extreme response bias, and even just boredom, are all issues. Learn to mitigate the risks by being aware of many scale options, wording choices and formatting tips.

This power program covers various ranking and rating scales, including Likert, semantic differential, constant sum, and more. The class also delves into decisions related to the choice of even versus odd scales, number of points (5? 7? 10? 11?), and related topics. The instructor will also cover scale selection considerations for both online and telephone data collection.

Behavioral Economics for Market Research

Research Rockstar

High-profile books like Dan Ariely's *Predictably Irrational* and Daniel Kahneman's *Thinking Fast and Slow* have not only been business world blockbusters, but market research industry catalysts for change. Now more than ever, market researchers are aware that self-reported behaviors and emotions can be challenging to capture. In this class, market researchers will learn key behavioral economics (BE) concepts and how they apply to research methods and analyses. Can we researchers improve market research insights and mitigate market research risks by leveraging BE lessons? Yes!

This class will teach and demonstrate key BE concepts such as priming, framing, anchoring and loss aversion. In-class exercises will give students a chance to experience applying BE lessons first hand. The market research version of innovation isn't necessarily technology (though it can be). In fact, some of the most dramatic innovations in research right now are more about "thinking" than "doing." Key areas of innovation in how we think about research are coming from behavioral economics and related research on unconscious decision making. What are BE's implications for questionnaire structure and wording? How about for focus groups and IDIs? What are the implications for pricing research? Branding research? Find out in this workshop.

Selling With Influence Paul Kirch, CEO, Actus Sales Intelligence

Selling with Influence - How can you get executives, colleagues, customers and others to buy into your ideas, support them, and implement plans and strategies successfully? If you believe in a top-down sales strategy, it all starts with developing your influence skills.

Effective Follow Up Strategies - How do you follow up without being intrusive? How do you capitalize on business cards you collect? What's the process for converting that initial exchange into a relationship? How often should you reach out to someone who is unresponsive? Learn the answer to these questions and more, in this session designed to make the follow up process simple, effective and engaging. You'll not only learn strategies that work, but you'll develop an understanding of areas many people fall short.

Questioning Skills - Successful salespeople ask more and better questions than average sellers. This session is designed to generate a list of effective questions for your sales situations and leverage a role play activity to put these questions to the test. Learn key question types used by successful sales professionals and how to implement them.

High-Value Selling – To be an effective sales professional, you must learn to sell on value, not price, and utilize all the sources of value that their company, products, and services can provide to customers. The ability to sell on value creates some objective reasons for the customer to select your company rather than one of your competitors. In other words, differentiate you or your brand. This can help you win new business and protect your existing relationships.

Networking at the Conference - If you struggle to create a return on investment (ROI) with exhibiting or networking at industry events, then you need to attend this session. You'll learn effective strategies for collecting more leads, as well as techniques for converting those leads into wins, thus driving a true ROI from your conference investment. From developing a pre-plan to building a next-step focus, event-based sales efforts can drive incredible results.





ISC is presented in four educational tracks: **The Future** includes trends, front-end innovation, early stage concept development and new approaches emerging over the short and long term. **Consumer Insights** includes shopper insights, positioning, developing and accessing brands, engaging and impacting the in-store/at-shelf experience and storytelling. **Specialty Research** includes B2B, secondary research-on-research and industry-focused research. **Tech Demos** are sponsored sessions for MR technology, software and other innovations. MRA has partnered with the QRCA - the Qualitative Research Consultants Association - to curate qualitative sessions for each track.

JUNE 2, 2015

9:00 AM to 4:00 PM

See previous page for descriptions.

ON-SITE TRAINING

Optional All-Day Course: Online Qualitative Research Methods

Optional All-Day Course: Behavioral Economics for Market Researchers

Optional All-Day Course: Questionnaire Design 201 – Scale Selection

Optional All-Day Course: Selling with Influence

JUNE 3, 2015

8:30 AM to 7:00 PM *Registration*

12:30 PM to 1:00 PM

Membership Meeting & Awards

1:00 PM to 2:00 PM

OPENING KEYNOTE

Better & Faster

Jeremy Gutsche, CEO, TrendHunter.com What great ideas are so close within your grasp? There are hidden patterns and clues that could lead you to your full potential, sooner. TrendHunter.com CEO Jeremy Gutsche will make you BETTER by teaching you how to overcome evolutionary traps that block innovation. Then, it will make you FASTER by teaching you six patterns of opportunity – repeatable shortcuts that you can use to find better ideas, faster.

2:15 PM to 2:45 PM

THE FUTURE

ConsumerCam: Better Point of View Recording for Breakthrough Insights

Julie Knox, CEO, Jigsaw Research USA **Alex Johnston**, Research Director, Jigsaw Research USA

Adapting as a leader in the new world. Cutting through the status quo. Challenging existing paradigms and enabling change. Subconscious bias and what to do about it. More authentic picture of people and why they behave the way they do. Behavioral economics. Observation with minimal disruption. Avoidance of overrationalization. Design, fieldwork, analysis and presentation of recommendations.

It's time to do research that cuts through the status quo to challenge existing paradigms and enable change. State of the art video and audio recording glasses help us get closer to behavior to identify System 1 biases and mental shortcuts in a retail environment.

TECH DEMO

Sponsored Session

CONSUMER INSIGHTS

Access to Knowledge

Dawn Cunningham, Chief Insights Officer, 3M

Brooks Pettus, CEO, 24tru/Qualvu Research intelligence. Enterprise-wide sharing and curating. Editing, sharing and extending existing and new insights. Leveraging video and documents.

Storytelling. The future.

Most marketing research databases are PowerPoint graveyards, but they don't have to be. Learn to give your marketers and researchers access to intuitively find the documents, images and videos they're looking for, ask questions of your current data and create new conversations about existing knowledge.

SPECIALTY RESEARCH

I. Can't. Understand. You.

Annie Pettit, Ph.D., Chief Research Officer, Peanut Labs

Rethinking of standard data quality measurements. Writing better surveys that lessen the deletion of valid opinions. Design of well written, easy to understand surveys with "human being" questions. Data quality tools that don't unfairly target non-English speakers. Making data more generalizable and valid. Treating the opinions of non-English speakers with the same respect and importance as English speakers.

We've created many data quality techniques to identify people who are deliberately providing poor quality data. But what happens when these techniques eliminate non-English speakers who have valid opinions, but a harder time understanding survey questions? It's time to stop deleting survey data from non-English speakers and start writing surveys that produce higher quality data, inclusive of a more diverse audience.

2:45 PM to 3:30 PM Expo Break

3:30 PM to 4:15 PM

THE FUTURE

Preparing for the 2025 Consumer

Lisa Joy Rosner, CMO, Neustar, Inc.

Big data. The Internet of Things (IoT). Consumer connected devices. Non-intuitive insights. Predicting, understanding and preparing for buying and other behaviors of tomorrow's consumer. Trends, trends and more trends. Emerging technologies. First-and third-party audience data.

In 2025, Virgin Media predicts data produced by humans will explode to a staggering 100 zettabytes - that's the equivalent of 36 billion years of HD video. The platforms supporting future marketers are turning out non-intuitive insights enabling them to more successfully identify patterns and inform strategies. Learn to understand the consumer of tomorrow, today.

TECH DEMO

How to Measure Implicit Associations That Influence Consumer Decisions and Behavior

Paul Conner, CEO, Emotive Analytics Learn and take control of DIY. Scientifically measure implicit thoughts and feelings

driving consumer purchases. Go beyond traditional techniques.

Recent developments, including Kahneman's work involving System 1 and System 2 processing, have shown that implicit feelings about brands and marketing strongly influence consumer behavior. But how do you measure that? In this session, Paul Conner lays the foundation for implicit association measurement techniques and demonstrates how to build them into online surveys. Conner presents IE Pro YOUTM, an automated, online implicit association measurement system that companies can use to design and conduct their own implicit studies in "do-it-yourself" fashion.

CONSUMER INSIGHTS

QRCA: Apples for Oranges: How Trade-Offs Drive Consumer Decision Making

Tom Rich, President, Thomas M. Rich & Associates

Tradeoff analysis model. Intuitive understanding of consumer decision-making. How products and brands create value. How tradeoff analysis as a tool can be employed during the design, field and reporting stages of the quantitative and qualitative research process.

In this session, understand how your brand creates utility, and how tradeoff analysis can be a powerful model for understanding consumer decision-making.

SPECIALTY RESEARCH

Stories Worth Sharing: NBC Universal's Three-Part Research Series

Carmen Bryant, Director, NBC Universal **Gaining entry with clients. How to be a**

thought leader. Leveraging resources. Efficiency and flexibility conducting MR. Getting the most value. Deeper client partnerships. Increased revenue.

Storytelling. Mixed methodological and ongoing approach.

Inspire your clients and colleagues with research stories they'll remember and share. This research publication helped NBCUniversal 1) showcase how well they understand their audience and 2) find a unified voice to talk with partners about how to leverage the breadth of their portfolio. This strategy could be working for you, too.

4:25 PM to 5:25 PM

KEYNOTE

"Good Enough" – The Myth of 70% Emotive Accuracy

Dan Hill, CEO, SensoryLogic

Emotions drive action. For business metrics from recall to call-to-action motivation as well as persuasion, satisfaction and loyalty, gaining emotional traction determines the outcome. How can it be otherwise given that the older, more densely wired emotional part of the brain sends 10x more data to the rational brain than vice versa? People don't think their feelings; they feel them.

Learn how to apply facial coding as a research tool to help clients' lower risks and optimize marketing, products and other business solutions. Facial coding enables us to scientifically yet non-invasively capture, quantify and analyze the emotions shown by consumers, executives, politicians, professional athletes, witnesses and others, thus ensuring the ability to address subtle points of possible resistance that keep clients from realizing their full revenue potential. And this can be applied to a variety of formats, including focus groups, individual interviews, mobile, experiential audits and online surveys.

Go beyond initial exposure reads by linking verbal input to emoting related to messaging, brand equity and purchase intent, ultimately ensuring the best, handson delivery of actionable insights rooted in emotional data.

5:30 PM to 6:30 PM Expo Reception

6:30 PM to 8:30 PM *Opening Reception*

JUNE 4, 2015

7:30 AM to 6:15 PM Registration

7:30 AM to 8:20 AM Breakfast

8:30 AM to 9:30 AM

KEYNOTE

Innovation, Technology and the Future of Marketing Research

Ashish Soni, Founding Director, USC Viterbi Engineering Startup Garage

This guy knows what's next. Even better, he knows how to make money by turning what's next in marketing research into a successful business. USC Professor Ashish Soni is steeped in Silicon Valley's technology start-ups – many of which are or will affect the market for marketing research.

Soni says that there are several skills driving innovation. The first is mindset. Business leaders have to inventory problems and pain points, as these often are the seeds of great businesses. The second is to be self-aware of your skills, strengths, weaknesses, network, access to resources, etc. The third is risk tolerance and the "affordable loss principle," requiring you to consider how much money you're willing to lose if you fail. Combined, skills two and three help you identify which route to take and where the probability of success is highest. The fourth is process analysis, which will give you the greatest odds of success, and include market size, demand, management risk (technology, financial, talent), etc. Finally, the execution, customer discovery, and design of a model to identify the key elements of the business are needed to drive innovation.

Innovation in the business of marketing research is not only possible, it's happening every day. With ISC attendees, keynote speaker Ashish Soni will share a road map of exactly how the best and brightest make innovation happen.





9:45 AM to 10:30 AM

THE FUTURE

Big Data and the Dawn of Algorithms in Everything Dr. Morten Middelfart

Competing in the future. Trusting algorithms and machine learning as equal partners and allies in today's competitive environment. Balancing computing and human strengths. Taking the intersection of management and computer science to seek excellence in organizational leadership and management.

Decision making is becoming increasingly algorithmic as opposed to human discovery driven as a consequence of harnessing the power of Big Data. The only way to compete in the future will be to understand and balance computing and human strengths.

TECH DEMO

Sponsored Session with Ashish Soni

As a follow-up to his keynote session, spend additional time with USC professor Ashish Soni in a more intimate setting. Sponsored by Quester.

CONSUMER INSIGHTS

QRCA: Using Online Communities to Build a Deep Customer Understanding

Jane Mount, PRC, President, Libran Research & Consulting

Tom Muraoka, Senior Manager, Customer Research, CVS Health

Gathering qualitative shopper insights.
Online communities. Cost effective options.
Inspiration for seeking deeper, more
empathetic understanding. Increasing
loyalty. Creative solutions to traditional
research needs. Most efficient ways to work
with providers.

In this session, find out how CVS Health uses online communities to forge a deeper level understanding of their customers. The techniques used harness empathy, creativity and efficiency to gather real-time insights that benefit the larger organization - while increasing customer loyalty.

SPECIALTY RESEARCH

Phone Research: Insanity or Competitive Advantage?

Mary McDougall, CEO, CFMC Survox
Strategic value of phone-based research.
Multi-mode approach, i.e. Web, in-person, mobile, IVR. Cost comparison. Managing research budgets. Richer insights.
Always-on digital generation. Underrepresented demographics. Technology barriers. API. Analyzing data from a single repository.

Technology barriers are coming down and researchers should once again consider the strategic value of phone research to reach seniors, minorities and other vital segments. Even with the high costs of cell phone dialing, phone-based research can fit budgets with a multi-mode approach. Learn how you can reduce weighting, speed up results, meet budget and deliver better insights.

10:30 AM to 11:15 AM $Expo\ Break$

11:15 AM to 12:00 PM

THE FUTURE

Big Data For Small Business: How To Implement Data Driven Decision Making

John Crockett, Vice President - Digital Innovation & Data Management, Environics Research Group

Demonstrating how Big Data will be used. Going beyond articulation of why it's important to MR's future. Relying, in part, on information technology experts from outside the industry. Leveraging cross-industry perspectives to build innovative approaches. Combining approaches to provide context and clarity. Finding appropriate applications for Big Data in MR.

Client needs are changing rapidly, leaving teams of researchers struggling to unlock the power of enterprise analytics without enterprise-sized investments. With our presentation, attendees will learn the keys to implementing Big Data analytics no matter how big their organization is.

CONSUMER INSIGHTS

Impressive Onboarding: How Verizon Delights New Customers

Steven LaGueux, Manager of Marketing Research, Verizon Wireless

Jennafer Stahl, Vice President, Research & Insights, Invoke Solutions

Onboarding research. Talking to customers. Efficient methodologies for quickly speaking with customers across the country. Creating a sense of consumer empowerment beyond that of being a source of revenue. Positive effects of gathering and sharing customer feedback. Enabling fast reaction to insights and adjustments to campaigns.

Research is essential to refining content and customer targeting to make messaging efficient and effective. Without it, Verizon would have continued to spend millions of dollars on onboarding communications without an informed roadmap, and they couldn't have achieved their intended effect of reducing calls to their Customer Service group and increasing customer satisfaction through onboarding. Find out how insights help Verizon optimize onboarding email content and delivery schedules to begin customer relationships on a positive note.

TECH DEMO

Operationalize Your Data with Dapresy's Enterprise Feedback System

Rudy Nadilo, President, Dapresy

Automatic generation of specific action plans tied to research and marketing data. Survey results that instantly trigger action for management. Evolutionary technology for data delivery and enterprise action.

Enfesys™ feedback management technology provides the ability to take direct action on data in ways that were impossible just a few years ago. Imagine if you could get a survey result that automatically triggers an action for a manager to call a customer. Or have sales results notify marketing of a trending problem. Enfesys™ can operationalize data by automatically generating specific action plans tied to research and marketing data. All captured and monitored within the system, and easily reported across the enterprise.

SPECIALTY RESEARCH

The Use (and Misuse) of Empathy in Market Research Tom Bernthal, Founder and CEO, Kelton Global

Inspiring researchers to own how and when empathy is deployed. Challenging the meaning of customer centricity and continuing to ask more from it. Benefits and shortcomings of using empathy as a primary tool to bring customers into the decision making process. Diagnosing disconnects and how researchers communicate with stakeholders.

Empathy does incite results: richer data, ending decision making in a vacuum and catalyzing action. However, customer centricity is more complex; it requires an ecosystem that ranges from building customers into deicsion making frameworks to hiring specific skillsets and mindsets. As industry momentum around this concept continues to rise, it's important to be aware of empathy's limitations and to dissect where and why empathy is helpful and harmful.

12:00 PM to 12:50 PM Lunch

12:50 PM to 1:50 PM

KEYNOTE

Why Social Media "Likes" Say More Than You Might Think

Dr. Jennifer Golbeck, Director, Human-Computer Interaction Lab, University of Maryland

Do you like curly fries? Have you Liked them on Facebook? According to computer scientist Jennifer Golbeck, that is one of the strongest indicators of your intelligence. Wait, what? How is liking the page about curly fries such a strong indicator when the content is totally irrelevant to the attribute that's being predicted? Computer scientist Jennifer Golbeck will explain how Facebook (and others) can guess things about you based on the information you share through random Likes and Shares. This data's out there already. What will you do with it?

2:05 PM to 2:50 PM

THE FUTURE

After Omni-Channel: Preparing for Digital Context

Martie Woods, Lead Strategist, Thought Leadership, Stone Mantel

Stacey Symonds, Sr. Director, Consumer Insights, Orbitz

Influencing behavior. Applying unique and actionable principles to future digital strategies. Mobility and wearables. Sensors and the Internet of Things. Social media and advertising. Exploring the shift from omni-channel to digital context. Understanding expectations and how to define the digital consumer. Multi-step insight gathering. Connecting innovators and leaders with "outside" industries. Sharing new levels of insights not found elsewhere.

How well do you really understand digital consumers? How does 'queuing,' a foundational consumer-to-digital behavior, affect people's abilities to think and act? How is digital context different from traditional context? What are the implications of digital context and decision-making for mobility and wearables, sensors and the Internet of Things, social media and advertising, location-based tools? Explore the shift from omni-channel to digital context and consumer expectations for digital derived from a multi-step insight gathering process.

TECH DEMO

Breakout Session

CONSUMER INSIGHTS

How the Ticket Oak Got Naked

Christopher Daniels, Head of Consumer Insights & Brand Strategy, StubHub

Leveraging research. Brand differentiation. Segmentation. Discrete choice analysis. Concept testing. Focus groups. User experience. Consumer insights.

Over the past few years StubHub has created a holistic consumer insights function that enables alignment between marketing and product to build a strong position in its market. Learn how to do the same, from the user level to aligning with the long-term strategic needs of your organization.

SPECIALTY RESEARCH

QRCA: Documenting the Consumer Pulse through Social Media Research

Ricardo Lopez, President, Hispanic Research Inc.

Inspiring and completely different ways of viewing social media research. Gaining a competitive edge by offering and delivering on methods not standard in the research industry. Gathering multimedia social media insights. Assembling impactful presentations.

Learn how to gather multimedia SM insight without aggregators using advanced search techniques and sophisticated clipping, downloading, and tagging tools.

2:50 PM to 3:35 PM Expo Break

3:35 PM to 4:20 PM

THE FUTURE

Branded Memory vs. Branded Experience

Samantha Moore, VP, Global Research Director, Ameritest

Ralph Blessing, Managing Director, Ameritest

Brand loyalty. Economic behavior in a dynamic marketplace. Types and meaning of memories and why measuring them is important to brands. Research that relies on visuals to tell a story. Monadic advertising testing using mainstream and proprietary techniques. Combining traditional (predictive) and futuristic research approaches.

Picture a world without the presence of brands like Apple, Google, Target and Coca Cola. Look pretty boring? We think so, too. Find out why measuring memory is important to a brand and precisely what it is that creates the brands consumers cherish as well as what kills brands that no longer are. A clue: quit defining your brand only by positioning statements and verbal descriptors and start exploring what can't be put into words.



TECH DEMO Breakout Session

CONSUMER INSIGHTS

Best Practices for Data Visualization and Presentation Design

Kory Grushka, Partner, Work Design Group **Andrea Bingen**, Consumer Insights

Manager, Pepsico

Practical, effective (and ineffective) solutions and best practices for data visualization. Inspiring, engaging, dramatic and persuasive development of presentation design. Optimal tools in different contexts. Consumer insights.

Most of us feel we could do more to make our presentations persuasive and compelling. Start here, by learning effective and ineffective ways to orient and visualize your data sets and gaining practical solutions you'll be able to incorporate into your work on a day to day basis.

3:35 PM to 4:20 PM

SPECIALTY RESEARCH

The Future of Music: Artists, Brands and Millennials

Yvette Quiazon, Global Ethnographer, whY-Q Inc.

Meredith Worrilow, Consumer Intelligence Manager, MediaVest

Looking for inspiration outside the MR industry. Social conversation. Brand risktaking. Today's youth culture. Traditional and deep-dive, two-part ethnographic research. Procuring the right respondents and gaining their trust. Emotionally connecting with consumers.

Changes in the way music is consumed mean savvy artists are involved in more than music. Brands have opportunities to partner with artists for the benefit of each – if they do it right. MediaVest and whY-Q? mined for universal insights and tips for a successful, authentic and mutually beneficial partnership between brands, music and consumers.

4:30 PM to 5:15 PM

THE FUTURE

QRCA: Ask the Right Questions to Create Smarter Hybrid Projects

Katrina Noelle, Founder, KNOW Research Janet Standen, Director, Strategic Insights Evaluating new qualitative platforms. Harnessing the power of technology in the right way. Incorporating the right new methodologies. Knowing what tools to use and when. Managing expectations. Understanding limitations. Making smarter decisions

Keeping up to speed with innovation, writing the best research brief and asking the right questions can help you make the right decisions as a research buyer in the fast changing world of new qual. We'll provide you with some answers on creating cost and time efficient qualitative hybrid designs for best results.

TECH DEMO

Breakout Session

SPECIALTY RESEARCH

Branded Entertainment? We've Got a Stat For That!

Dr. Raymond Pettit, Chief Analytics Officer, Rentrak, Inc.

Expanding the measurement of media value. Integrated media weights for audience measurement. Looking beyond the traditional method of copy testing. Advanced editing and markup software. Behavioral economics. Creating a time series dataset. New developments in data collection and Big Data analytics. Looking outside MR (i.e. engineering, tehnology and science).

Companies are thinking beyond traditional TV advertising and investing in branded content; research has to keep up. Find out how the ad and brand integration impact for the Olympics for eight major global sponsors was measured using advanced analytics and engineering principles.

CONSUMER INSIGHTS

Mobile UX Testing: I Think I'd Click Here?

Ashley Bilko, Market Research Manager, Transamerica

Shelli Boydstun, AVP, Market Research Center, Transamerica

Mobile user experience testing. Product development. Developing and launching new mobile websites (without relying on assumptions or old best practices). Protecting brand image. Overcoming initial product development adversity. Deflecting negative outcomes inherent without the benefits of user testing. Saving time and money. Multi-mode, including reflector technology. Collaborating with various internal resources.

The best cure is prevention! Bad user experiences are destroying brand images and costing companies millions. In this presentation, Ashley Bilko and Shelli Boydstun will tell you how UX testing made this product launch a huge success.

JUNE 5, 2015

7:00 AM to 11:00 AM *Registration*

7:30 AM to 8:20 AM Breakfast

8:30 AM to 9:30 AM

KEYNOTE

Demographic Shifts Are Moving Your Markets

Joel Kotkin, Internationally-recognized authority on global, economic, political and social trends

In the past ten years, market researchers have been bombarded with numerous changes in technologies and methodologies that have been geared to assist them in tying together actual consumer behavior with the consumers expressed attitudes. As the market research profession has been busy deciding which of these technologies and methodologies is best suited for them and their clients, there also have been massive changes in the dynamics of population and class in not only the U.S. but across the globe.

To help us understand what the impact these changes will have for marketing researchers, we've invited the internationally-recognized demographer and authority on global, economic, political and social trends, Joel Kotkin.

Kotkin will be presenting key findings from research he has conducted solely for MRA and those attending ISC, as he will specifically address key demographic shifts that will have significant impact to the marketing research industry.

Did you know that Jacksonville and Baltimore are the two hottest locations for those wishing to conduct Hispanic market research? Or that Pittsburgh is an ideal location for reaching highly educated consumers? Do not miss the chance to hear these exclusive findings from one of the world's leading population experts, as well as his vision on how the nation's population and various merging social communities will evolve over the next four decades.

9:45 AM to 10:30 AM

THE FUTURE

Adobe: The 5 Most Disruptive Trends in Technology for 2015

Mark Asher, Head of Market Intelligence & Strategy, Adobe Systems, Inc.

Disruption. New devices and platforms. Making sense of data. Privacy and regulatory concerns. Rethinking traditional strategies. The consumer/brand relationship.

Bandages that monitor your baby's vitals. Connected homes that monitor your marriage's health. Learn how new devices and data platforms will impact our lives and fundamentally change the relatonship between consumers and brands, forcing marketers to rethink their traditional strategies as they consider how to exploit these new technologies.

TECH DEMO

Breakout Session

CONSUMER INSIGHTS

What Are Insights Without Behavior Change?

Alison Birnbaum, **LCSW**, Partner, ShrinkWrap

Behavioral insights and neurobiology. Tapping into an undifferentiated brand's target primal motivations to change behavior, generate incremental volume and win praise. Illustrating the difference between "true but useless" insights and

those with the potential to affect behavior. Focusing on less cognitive aspects of consumer decision making. Triggering visceral experiences. Capturing insights that are more effective in the marketplace.

Many insights, while true and resonant, are useless in triggering behavior change. Instead we need to find the target's primal motivators, the insights that have the power to overcome the barriers to the behavior you are trying to affect. This is what makes insights actionable; let's shift the paradigm from "consumer insight" to "behavior change triggers."

SPECIALTY RESEARCH

Online Mega Groups: Up Close and Personal

Carol Wilson, CMRP, Director of Player and Customer Insights, GTECH

Online mega focus groups with webcam. Surveying panelists. Real time polling. Entertaining and putting on a show for players (respondents). Getting to really know your panelists and letting them get to know you. Creating low churn by eliminating the label of "another faceless panel" (which respondents traditionally quickly tire of). Including special guest appearances by verbatim facilitators to manage data overload.

Want to really engage your panelists? Put on a show! The secret sauce is made up of one entertainer, one conductor, one gatekeeper and webcams for two of the three. There are many panels and people leave a panel quickly if they do not feel engaged and rewarded. Decrease churn by upping the fun and letting your panelists get to know you.

10:30 AM to 11:30 AM $Expo\ Break$

11:30 AM to 12:15 PM

THE FUTURE

QRCA: Harness Emotional Insights in Two-Dimensional Online Research

Emily Prozeller, Research Director, C+R Research

Leverage online qualitative research (discussion boards, mobile, webcam IDIs, media, etc.) to explore consumer emotion. Learn interesting tricks and creative fodder for uncovering sentiment across topics.

How do you get real, authentic and emotional feedback from two-dimensional interactions? Learn to generate personal exchanges and uncover intimate consumer emotions online.

TECH DEMO

Breakout Session

CONSUMER INSIGHTS

The Power of Insight Reviews

Kelly Goto, Principal, Design Ethnographer, gotoresearch

Insight reviews. Capturing insights at varying levels. Ideating long-term innovation strategies. Utilizing mixed UX research methods nationally and globally. Behavior driven personas and experience maps. Relevant, meaningful and seriously taken research. Empowering research teams to utilize skills, thus allowing iteration and integration into the product cycle. Gaining creative and deep insights. Producing deliverables that merge qual and quat data in visually impactful ways.

New methods of UX research enable rich insights not possible through traditional market research. Learn how this new type of real-time longevity study will inform and prioritize your product vision.

SPECIALTY RESEARCH

Research on Research:
Creating Real Business Impact
Manila Austin, Ph.D., VP, Research,

Communispace

Addressing the

Addressing the most common barriers and strategies for making an impact. Exploring critical impact barriers and sharing client success stories. Evoking emotional content from consumers. Creativity sharing and applying consumer insights with business stakeholders. Winning by complementing data through consumer relationship building (not collecting the most data). Infusing organizations with inspiration. Building empathy for customers' reality. Driving front line and strategic action.

Research on research reveals the best tactics to motivate stakeholders and provoke action. What practical strategies drive results? Interviews with customer-centric executives from Fortune 500 companies guide new best practices and a rethink of the role and purpose of the consumer insights function.



You always learn more on the playground anyway.

While formal presentations provide structured learning, being face-to-face with like-minded practitioners still is the most efficient and effective way to learn from the experience of others.

Be part of a warm and inviting research community. Spark creativity by immersing yourself in new ideas, skills and innovations with your peers at ISC.

Expo Breaks (4)

Share your problems. You'll get solutions. Education continues through ISC's 50+ exhibitors who offer a wealth of experience through their work with others - which may just benefit you! These brainiacs could serve as your trusted partners, offering products and services to optimize the development of marketing research insights and strategies. All you have to do is ask. Insider tip: Exhibitors on the last day of a conference can be the best possible people to talk to. They're relaxed, helpful and creative, offering suggestions to anyone who stops by. Also, they're low key and low pressure, as they've seen most everyone already and are happy campers. So go ahead. Stop by and say hello!

Expo Reception

Drinks will be served, conversations will flow, innovation will happen. Join us for the Expo Reception as we begin to wind down Day One at ISC!

Opening Reception

This is the big party, with an open bar, lots of food and hundreds of the best and nicest researchers you'll ever meet! Situated on a spectacular balcony overlooking San Diego Bay, the Expo Reception will roll right into the Opening Reception - a traditional favorite, where you can have dinner, share insights learned on Day One, and relax with friends.

Breakfast (2)

Free bacon! (etc.) We're not fruit-and-bagels people. It'll be the full spread, if you don't sleep in.



Lunch

The full deal, a relaxed sit-down lunch between sessions. No cold cuts here, as you need a lot of power to make it through the day. Grab a lunch partner and a seat and we'll serve you!



YOUR REGISTRATION INCLUDES

Breakfast Thursday and Friday morning, lunch on Thursday, all expo breaks, expo reception ticket, and opening reception ticket. You may buy a guest ticket for the receptions when you register for the conference.

Pricing

\$1599 Member

\$1799 Non-Member

\$1974 Non-Member + ½ price MRA membership

June 2 all-day training courses: \$499 per student fee. A \$150 bundled discount will be credited when you register for both ISC and one course.

Send more than one team member to ISC and get a discount (who doesn't love a discount?). Pay full price for the first person, receive 15% off your second registrant and 20% off registrants 3 and up. Be sure to register everyone online at the same time for the discount.

REGISTER AT ISC.MARKETINGRESEARCH.ORG



THE HILTON SAN DIEGO BAYFRONT

No other San Diego hotel can compare to the elegance and sophistication of the Hilton San Diego Bayfront. Steps from downtown's Gaslamp Quarter and PETCO Park and minutes from San Diego Airport, this beautiful San Diego hotel offers the finest amenities and lays the best of the city at your doorstep.

Conference Rate is \$260.50 and the reservation deadline is May 11, 2015. Go to ISC.MARKETINGRESEACH.ORG/VENUE or call 619.564.3333 to book your room.



REGISTER AT ISC.MARKETINGRESEARCH.ORG

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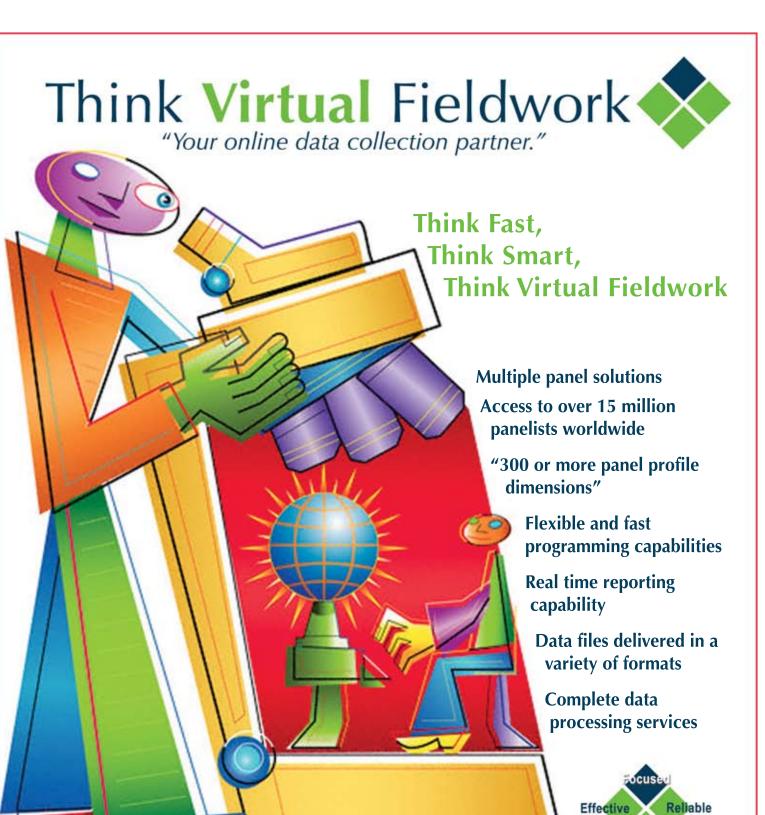








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