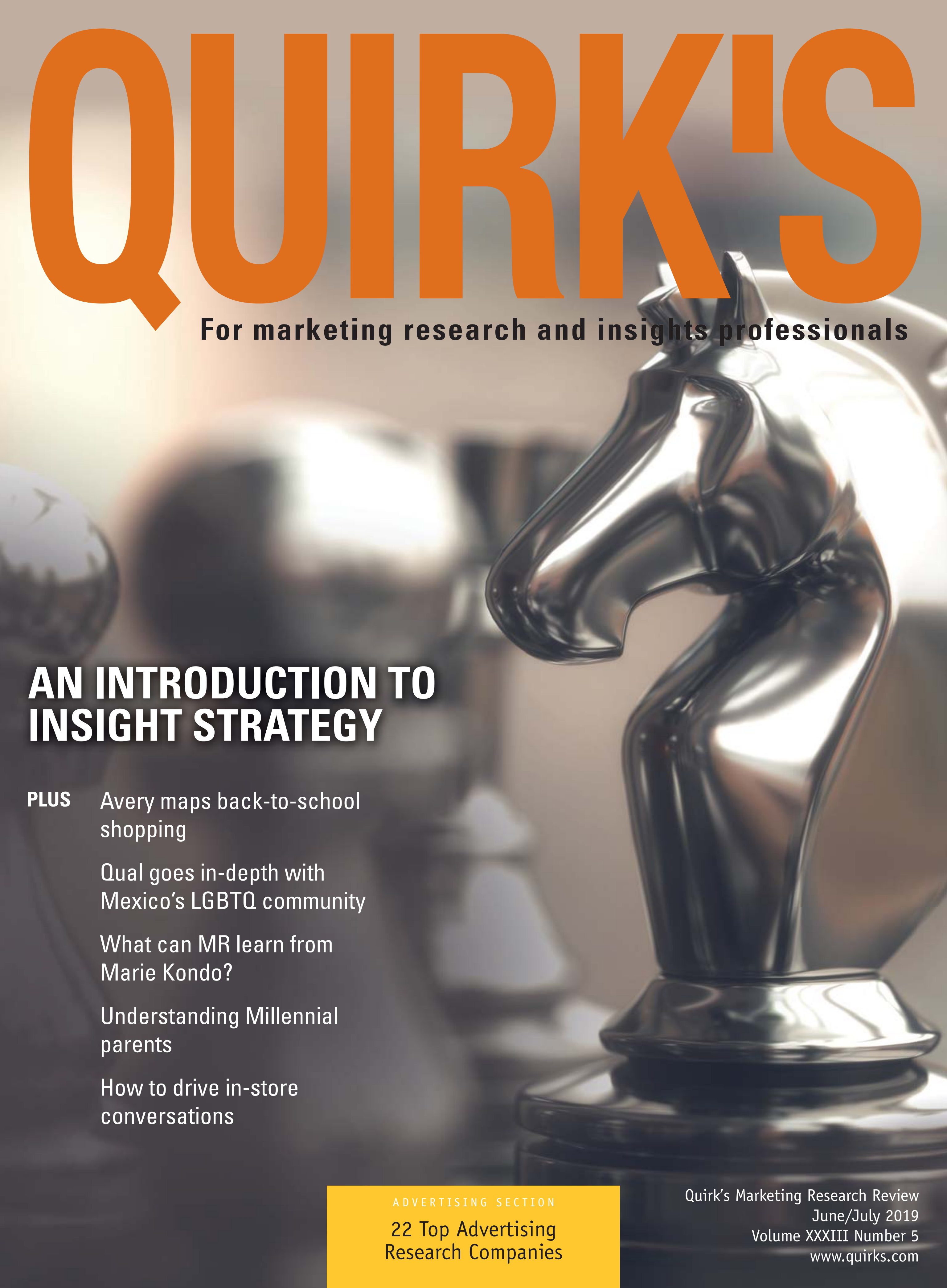

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For marketing research and insights professionals

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PLUS

Avery maps back-to-school shopping

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What can MR learn from Marie Kondo?

Understanding Millennial parents

How to drive in-store conversations

Quirk's Marketing Research Review
June/July 2019
Volume XXXIII Number 5
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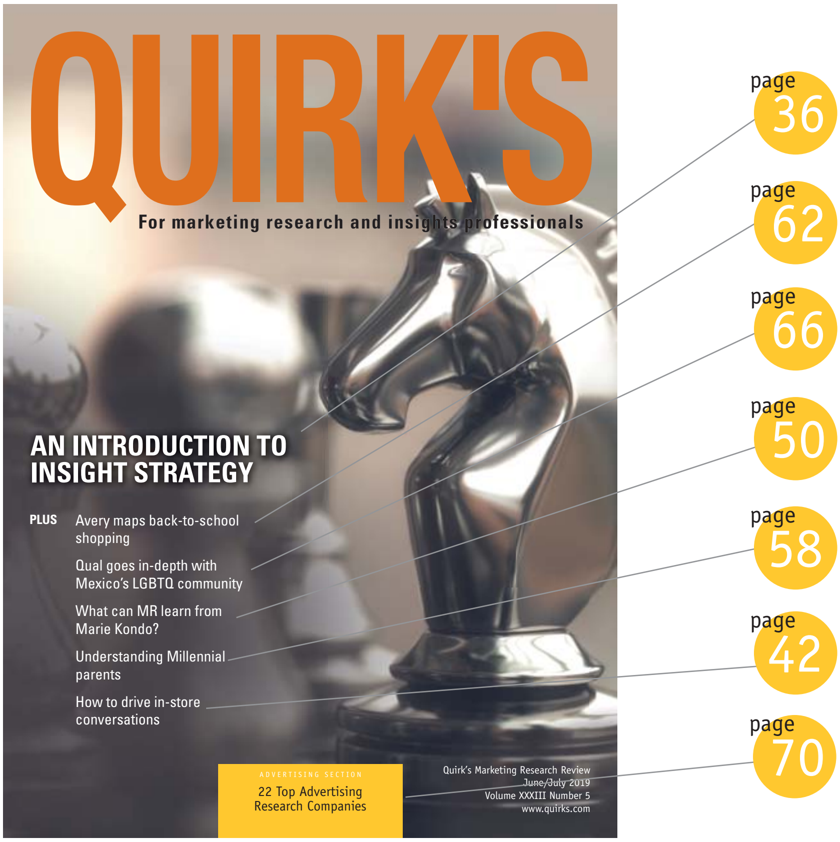

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Quirk's Marketing Research Review
4662 Slater Road | Eagan, MN 55122
651-379-6200 | www.quirks.com

Publisher • Steve Quirk
steve@quirks.com | x202

Editor • Joseph Rydholm
joe@quirks.com | x204

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

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

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

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

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

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

Sales • Lance Streff
lance@quirks.com | x211

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

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JANUARY THROUGH DECEMBER 2019

SEMINAR DATES, LOCATIONS & FEES

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Charlotte, NC	Mar 25-27	San Jose	Oct 21-23
Chicago	May 14-16	Cincinnati	Dec 4-6
New York	July 15-17		

RM03 - Designing Effective Questionnaires: *A Step by Step Workshop* — $2,845

Charlotte, NC	Feb 12-14	Chicago	Aug 13-15
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COMMUNICATION

C01 - Writing & Presenting Marketing Research Reports: *Insights, Storytelling, Data Visualization* — $2,845

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QUALITATIVE

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

Q02 - Specialized Moderator Skills for Qualitative Research Applications — $3,345

Cincinnati	Mar 12-15	Cincinnati	Oct 15-18
Cincinnati	June 25-28		

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••• awards

The Marketing Research and Insight Excellence Awards

Marketing research sits at the center of the goal of integrating the customer's voice into every aspect of an organization. Yet even as customer-centricity grows in importance as a modern business best practice, the marketing research and insights function still doesn't get all the acclaim it deserves.

The Excellence Awards are here to change that.

Powered by Quirk's Media – the industry's most respected provider of content, events and resources for marketing researchers – the awards will shine a much-deserved spotlight on the researchers, vendors and products and services that are adding value and impact to marketing research.

The award ceremony will be held in New York City on November 18, 2019. Tickets for this black-tie, red-carpet event will go on sale in August.

Nominations opened in early June and must be received by July 19. Awards will be judged by a lineup of client- and supplier-side marketing researchers and Quirk's editorial staff. Information on categories, rules and eligibility is available at quirks.com/awards. Also see this month's Trade Talk (p. 10) for an overview.

// E-newsworthy

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Patient or consumer?
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Research Industry Voices

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Research Careers Blog

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Leading a diverse workforce
https://bit.ly/2VHUIPs

Gauging the hiring market for data scientists and analytics professionals
https://bit.ly/2Qce219

••• data privacy

Companies increase consent collection but lack compliance knowledge

A survey by PossibleNOW, a provider of enterprise consent and preference management solutions, found a 26 percent increase in businesses utilizing consent collection from 2018 to 2019. Last year, just 38 percent of companies reported collecting consumer consent. Another 31 percent reported they weren't sure if they were collecting this information.

This year, 64 percent reported actively collecting consumer consent, while 28 percent remained unsure. Consent management provides a company the ability to continue its marketing efforts toward its customers in an environment of increasing regulatory laws such as GDPR and CCPA.

When asked about GDPR compliance, 24 percent of respondents reported compliance in 2018. When respondents were asked the same question in 2019, only an additional 3 percent reported they were compliant.

Companies were further asked which GDPR requirements they found most challenging. Forty-four percent of respondents said that "right to access" laws such as providing customers a copy of their personal data and the purpose for processing that data were most challenging. Another 33.3 percent reported that consent management such as capturing, storing and distributing consent across the company created confusion. While companies report their consent collection has increased, confusion around management of this data also increased.

www.quirks.com/articles/2019/20190601.aspx

••• shopper insights

Online reviews exert powerful influence on choice

What's the most important source of information when choosing a service or professional? According to the 2019 edition of an annual survey by ReviewInc. of over 20,000 U.S. consumers, online reviews have the most influence.

The latest report shows that among choices such as media advertising (5.9 percent), online ads (8.4 percent), traditional Yellow Pages (10.3 percent), a company's Web site (19.7 percent), referral or word of mouth (9.2 percent) and "other" (2.0 percent), entries on Google, Facebook, Yelp and other sites that allow users to leave reviews dominated, with 44.5 percent of the claimed purchase decision influence. (Each respondent was provided with a multiple-choice list from which they could only chose one answer.)

The survey found that women (48.2 percent) are more likely to rely on review sites than men (43.2 percent). This difference of 5 percent has been consistent over the past five years. It is also notable that the influence between age groups has shifted, with the biggest drop in claimed influence of online reviews occurring in respondents between the ages of 18-24 (from 51.1 percent in 2017 down to 48.3 percent influence in 2019) – suggesting trends favoring social media rather than traditional review sites.

By Joseph Rydholm, Quirk's Editor

Coming soon: the Marketing Research and Insight Excellence Awards

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Joe Rydholm can be reached at joe@quirks.com

Marketing research sits at the center of the goal of integrating the customer's voice into every aspect of an organization. Yet even as customer-centricity grows in importance as a modern business best practice, the insights function still doesn't get all the acclaim it deserves.

The Marketing Research and Insight Excellence Awards are here to change that.

Powered by Quirk's Media, the awards will shine a much-deserved spotlight on the researchers, vendors and products and services that are adding value and impact to marketing research.

There are already other awards in our industry and our goal is not to replace or obscure the efforts of their respective issuing bodies. But with our decades of focus on the client-side researcher, born of Tom Quirk's formative years as a client-side researcher before jumping to the vendor side just prior to launching *Quirk's Marketing Research Review* in 1986, we felt like an awards ceremony that focused on elevating and celebrating marketing research and insights, especially on the client side, was a natural fit for us.

And we wanted to make sure that our awards are selected by a panel of judges and/or Quirk's editorial staff rather than just being an Internet-voting popularity contest.

At the time of this writing in mid-May we are still hammering out some of the details but here's what we do know for sure: the black-tie ceremony will be held on November 18 at the Edison Ballroom in New York City. Nominations opened in early June and must be received by July 19. Awards will be judged by client- and supplier-side researchers and Quirk's editorial staff.

Here is a quick snapshot of the awards and their criteria:

Researcher of the Year (end-client) Researcher of the Year (supplier)

Judged by Quirk's

The Researcher of the Year award recognizes one client-side researcher and one supplier-side researcher who are proven game-changers for the marketing research industry. We're looking for trailblazers, individuals making a significant difference in the overall promotion of MR as well as the performance of their organization.

Client-Side Team

Judged by a panel

The Client-Side Team award recognizes client-side marketing research and insight teams making outstanding contributions to the success of their company. Researchers who consistently execute high-quality research; elevate the role of research and insights within the company; and work to collaborate with key internal stakeholders.

MR Supplier

Judged by a panel

The MR Supplier award recognizes marketing research and insight firms making outstanding contributions to the success of brands. These companies consistently exhibit a collaborative business relationship with clients.

Global MR Project

Judged by a panel

The Global MR Project award aims to highlight an MR-related multi-country project. It is open to end-clients and supplier/end-client teams. Nominated teams must be able to document the successful launch of a multi-country MR-related project.

Nonprofit/Social Enterprise Research Project

Judged by a panel

The Nonprofit/Social Enterprise award recognizes a research project (completed or ongoing) that has had a demonstrated impact on a nonprofit organization, government project or social/human interest issue. Nomi-

www.quirks.com/articles/2019/20190602.aspx

nations are open to end-clients and supplier/end-client teams.

Best New Product/Service
Judged by a panel
The Best New Product/Service award recognizes a research product, tool or service making an impact on the marketing research industry.

Groundbreaking Research Project
Judged by a panel
This award aims to highlight a marketing research-related project that took an innovative approach. It is open to suppliers, end-clients and supplier/end-client teams. Nominated teams must be able to document the successful launch of an MR-related project.

Outstanding Young Researcher (end-client)
Outstanding Young Researcher (supplier)
Judged by a panel
The Outstanding Young Researcher award will be given to an individual 30 years of age or younger to recognize their contributions to the marketing research and insight industry.

B2B Research Project
Judged by a panel
The B2B Research Project award acknowledges the effectiveness, creativity and innovation in business-to-business marketing research. It is open to suppliers, end-clients and supplier/end-client teams.

MR Impact
Judged by a panel
The MR Impact award recognizes end-clients who have successfully implemented MR solutions within their organization. Teams will be selected based on demonstrated performance of an actual MR implementation across any vertical or application.

Philanthropic Company of the Year
Presented by the Marketing Research Education Foundation (MREF)
Judged by MREF board
This award is given to a marketing research company that leads by example in the giving of time and financial resources in relation to the size of their organization. It encourages volunteering, supporting its employees to go above and beyond to make a significant contribution to our world. It displays philanthropic leadership in its community and gives of its resources, financially supporting its causes for a lasting impact.

MREF Everyday Hero Award
Presented by the Marketing Research Education Foundation (MREF)
Judged by MREF board
This award is designed to recognize a researcher – client- or supplier-side – who selflessly gives of his or her time and talent to make the world a better place but who may not be getting the accolades he or she deserves. This individual is impacting their world through efforts such as: volunteering a significant amount of time/resources to a worthy cause; doing the behind-the-scenes work an organization depends on; or leading and encouraging others to give back through volunteering or other efforts.

More complete information on categories, rules and eligibility is available at quirks.com/awards.

IN FOCUS

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

// Survey Monitor

••• leisure research

Plenty of room under the tent

Number of new, non-white campers hits a high

Since the ethnic mix of campers was first measured in 2012 as part of an annual study of camping by Kampgrounds of America Inc. (KOA), the percentage of non-white camping households has increased from 12 percent to 29 percent. What's more, for the first time since measurement of new campers began in 2014, the percentage of new non-white campers (51 percent) in 2018 outpaced the percentage of new Caucasian campers (49 percent). This means that those new to camping are more diverse than the overall U.S. population – half of the newest campers are from non-white groups and exceed U.S. Census figures.

More than 7.2 million households in the U.S. have started camping over the past five years, bringing the total number of camping households in the U.S. to a new high of 78.8 million, according to the 2019 North American Camping Report, an annual independent study supported by KOA. North Americans are also camping more frequently than ever before, with 72 percent growth among those who camp three or more times each year – the most avid group of campers – since 2014.

Key factors driving this upward trend include: an influx of younger and more diverse campers; Millennials having kids and taking them camping; and North Americans' love for the outdoors.

The explosion of camping is leading to greater diversity as well. Of the 1.4 million households that started camping in 2018 alone, 56 percent are Millennials and 51 percent are from non-white groups. Millennials currently make up the largest segment of campers at 41 percent, up seven percentage points since 2014, and Gen Xers make up 36 percent, up nine percentage points.

Hispanic campers represent 11 percent of all camping households and are the largest group of non-white campers. Representation of new Hispanic campers grew in 2018 to 22 percent, exceeding U.S. Census figures at 16 percent. African-American campers now represent 9 percent of camping households and Asian-American campers 7 percent, both representing growth from the initial reporting in 2014. African-American campers are the youngest demographic of campers with 64 percent Millennial representation.

Changes in life stage, specifically starting a family, are a significant factor fueling the growth of camping. Fifty-four percent of Millennials are now camping with kids and when asked what was the key trigger that got them to camp more, the majority said having kids. Millennials with children in the household are an avid group of campers: 63 percent camp more than seven nights per year and two-thirds plan to camp more in 2019.

In fact, camping families with children in the household form the most avid group of campers overall. This group took the most camping trips and spent the most nights camping in 2018 and are substantially more likely to camp more often in 2019.

Half of all campers say their love of the outdoors is what sparked their interest in camping. This has remained the leading driver over the last five years. Campers are increasingly seeing camping and other forms of outdoor recreation (hiking, biking, fishing, etc.) as one in the same. This trend is being driven primarily by younger campers.

Campers are sharing the love, too, with 48 percent of new campers reporting

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that other people got them interested in camping. Overall, campers – no matter age or ethnic background – view camping as a time to reduce stress, clear their minds and spend more time with family.

The findings of the 2019 North American Camping Report suggest this momentum will continue given North Americans' enthusiasm and strong commitment to camping. Survey results show the growing camper segments have a great deal of enthusiasm for taking more trips and camping more nights each year.

More than half (51 percent) of parents report that the enthusiasm for camping among their children has never been higher. And teen campers agree: 96 percent say they enjoy the time camping with family and friends and they say they are healthier thanks to the benefits of camping and other outdoor activities.

Further, one-third of all American and Canadian campers now self-identify as a "lifelong" campers, the highest rate since the survey's inception in 2014. Both Millennials and Gen Xers are more likely to identify themselves as lifelong campers when compared to past years.

New trends in different camping experiences, including glamping and van life, are also contributing to the increasing interest and expanding the modern definition of camping. According to findings in the 2019 report, close to half of all campers are interested in a glamping or van life experience, a rate that has doubled since last year. Campers' excitement to try new and different methods of camping has spawned new and expanding extensions of the outdoor industry.

"Since we started measuring the North American camping market five years ago, we've seen increasing diversification of age, life stage, ethnicity and even sexual orientation among campers, yet what remains consistent is a shared connection through a passion to immerse themselves in the outdoors through camping," says Toby O'Rourke, president and CEO of KOA. "We ultimately believe

••• financial services

Not standing on guard against fraud

Canadians dialing back data security measures

Fewer Canadians are double-checking their financial statements, shredding personal documents or installing security software on their computers despite the increased threat of fraud and identity theft, according to Equifax Canada. Data flagged by financial institutions and tracked by Equifax Canada also found that: attempts of credit card fraud have increased by 42 percent over the last two years; Millennials were targeted in 48 percent of all fraudulent credit card applications in 2018; and suspected true name fraud (when an identity thief poses as a real person in completing a credit application) has also increased by 84 percent over the last five years.

"Identity theft and fraud is more complex and sophisticated than ever, which should be of growing concern for Canadians," says Tara Zecevic, vice president, fraud prevention and identity management, Equifax Canada. "Millennials, in particular, should be doing more to educate themselves and protect their personal data given the incidence of credit card fraud we saw in 2018. It seems that complacency is setting in for some people when we actually need to be more vigilant than ever in the fight against fraud."

With the data in hand to support a rise in fraud and identity theft, Equifax Canada wanted to hear from consumers. It conducted a consumer survey designed to gauge what people think about identity theft and the habits they practice when it comes to protecting themselves. This is the second year that Equifax Canada has conducted the survey.

The survey found that consumers were doing more in two areas: sharing less on social media (up 43 percent from 39 percent) and more people are checking their credit reports (up to 28 percent from 21 percent). Surprisingly, Millennials checked their credit reports more than any other age group (29 percent).

Thirty-seven percent of Canadians say they have been victims of identity theft or fraud at some point and the overwhelming majority of consumers surveyed (88 percent) have taken some steps to protect their personal information. Those numbers, however, are declining as only 59 percent of survey respondents double-checked their credit card statements compared to 65 percent two years ago when Equifax conducted a similar survey.

Likewise, people are shredding documents less, with a drop from 57 percent to 52 percent and only 35 percent have updated their security software on their computer compared to 42 percent in 2017.

Equifax surveyed 1,565 Canadians ages 18-65, Feb. 1-4. A probability sample of the same size would yield a margin of error of +/- 2.5 percent, 19 times out of 20.

that the fundamental reason why people camp – to connect with each other and with nature – will not change, but how they camp may. We continue to evolve our offerings based on these insights to provide campers with better experiences, thus meeting needs and continuing to help foster the growth of camping throughout North America."

Traditional camping – tents, RVs and cabins – remains strong, but the growth in new and unique camping styles has skyrocketed as camper demographics continue to change. Tent camping remains the most popular way of camping for North Americans (59 percent), while RVing represents 24 percent and cabin camping 16 percent of the market. Millennials (56 percent) and Gen Xers (46 percent) are most likely to have tried new lodging in 2018; most Millennials tried tent camping while Gen Xers tried a full-service cabin with a bathroom.

While campers of all ages and ethnicities are interested in trying a luxury cabin camping experience in 2019, half of all campers surveyed said that they would also like to experience glamping of some type in the coming year – a rate that has more than doubled since 2017. Van life has also surged in popularity over the last five years. While the rate is much lower against glamping, there is was a 6 percent-point increase from 2017 to 2018 among campers of all ages who would like to experience van life from 2017 to 2018.

Among the subset of RV campers, 61 percent own the RV they use most and 36 percent rent or borrow the RV they use most, a shift from 2017 that now favors ownership. Increases in RV ownership are being driven by Gen Xers who, likely driven by changes in their life stages, increased ownership rates in 2018. Fifty-eight percent of Hispanic campers indicated they'd be interested in an RV experience – the highest interest level among all camper groups. African-American campers' interest in tent camping for backpacking or backcountry experiences – such as biking, canoeing or kayaking – grew 22 percent in 2018 compared to 2017.

U.S. and Canadian household results: This survey was conducted by Cairn Consulting Group, an independent market research firm, in January. The sampling methodology targeted a randomly selected sample of U.S. and Canadian households. Sampling was designed to obtain n=2,900 completed surveys among representative U.S. households and representative Canadian households. A sample of n=2,400 U.S. households is associated with a margin of error of +/- 1.99 percent. Among Canadian households, a sample of n=500 is associated with a margin of error of +/- 4.37 percent.

Teen survey results: The results are based on a total of 400 surveys completed among a random sample of U.S. households with children between the ages of 13 and 17. Each survey was completed with a teen respondent whose parents gave prior permission. A sample of n=400 teen campers is associated with a margin of error of +/- 4.9 percent.

All surveys were completed online via an outbound solicitation sent to a randomly selected cross-section of U.S. and Canadian households. The sample of households from which the surveys were completed was statistically balanced to ensure that the results are in line with overall population figures for age, gender and ethnicity.

••• b2b research

More than a number-cruncher

Financial controllers evolving into strategic risk managers

A survey of accounting and finance professionals found that the role of the controller has expanded to include risk management and internal controls. Almost all (95 percent) of respondents say their role is more strategic, while 69 percent characterize the controller as a risk manager who oversees internal controls.

The research, sponsored by Los Angeles-based software firm FloQast and conducted by Dimensional Research, sought to identify the impact of controllers within today's accounting vertical as well as understand how and why their roles have evolved. It includes survey results from more than 300 accounting and finance professionals, including over 200 controllers, and reinterprets the controller's role within a company as one far more complex and strategic than ever before.

As new technology and business outcomes add to the stressors of maintaining a company's financial health, the controller's responsibilities now overlap with those traditionally given to the CFO. With the CFO taking on a more strategic role themselves as the right hand of the CEO, the controller has to backfill a lot of traditional CFO responsibilities and aid the CFO in planning. Seventy-three percent say the controller's role is changing because the CFO role has changed, while 90 percent report controllers are spending more time on strategic planning – a job historically done by the CFO.

"The modern financial controller does not fit the stereotype of the number-cruncher who hides in an office with his or her spreadsheets and ledgers and sends incomprehensible reports to the CFO who interprets them for the C-suite," says Diane Hagglund, senior research analyst of Dimensional Research. "As the role of the CFO and the overall finance team has expanded, the controller understands how good data about business operations – both financial and non-financial – directly impacts the quality of decision making."

Advancements in technology mean required software competency. Given how core accounting is to most ERP systems, the controller now has to manage many IT systems; 78 percent of respondents say controllers now spend more time on IT management.

Job stressors have changed – and increased. Eighty-nine percent say the controller's job is more stressful. Top stresses include management demands for speed (67 percent), higher volume of work (64 percent) and compliance demands (63 percent). More concerning, 64 percent have experienced pressure to "cook the books."

The controller is no longer a lone wolf. According to the survey, only a small number (31 percent) of controllers view themselves as the individual who prepares necessary financial reports. In midsize (74 percent) and large enterprises (82 percent), respondents were much more likely to view the controller as a risk managers with oversight of internal controls.

Despite the rapid transformation and steep expectations in maintaining satisfactory job performance, very few controllers are dissatisfied with their job. While 88 percent of the survey respondents have been offered outside job opportunities in the last year, only 11 percent of controllers are actually looking for jobs.

The survey was conducted by Dimensional Research in January. A total of 306 accounting and finance professionals participated in the survey included over 200 controllers from the U.S., Canada, Europe, Asia, Africa and Latin America.

••• b2b research

IT leaders struggle with digital integration

Too many apps, too many silos

A global survey of IT leaders, the 2019 Connectivity Benchmark Report, conducted by San Francisco technology company MuleSoft, found that while 97 percent of organizations are currently undertaking or planning to undertake digital transformation initiatives, integration challenges are hindering efforts for 84 percent of organizations. Close to half of all respondents (43 percent) reported more than 1,000 applications are being used across their business but only 29 percent are currently integrated, trapping valuable data in silos.

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

The role of IT is changing from a tactical function to a business catalyst. However, business's growing need for IT support is reflected in the increasing number of projects IT is expected to deliver. In addition, with a growing investment in new technologies, organizations are seeing integration challenges hinder digital transformation initiatives.

Eighty-four percent of respondents claim integration challenges are slowing digital transformation progress. In particular, data silos created business challenges for 83 percent of respondents.

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

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

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

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

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

Respondents who manage their APIs like products were more likely than their peers who own APIs to report increased innovation (49 percent versus 40 percent) and greater agility across teams to self-serve IT (58 percent versus 46 percent). Respondents who always reuse software assets when developing new projects were more likely than their peers who own APIs to report increased productivity (63 percent versus 53 percent) and revenue growth (41 percent versus 29 percent).

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

••• employee research

Snacks and happy-hours for me!

Men, women prefer different workplace perks

U.S. employees rank "compensation" as the most important factor in their happiness, followed by "flexible hours and the ability to work remotely" and "doing meaningful work," according to study by Wrike, a San Jose, Calif., maker of collaborative work management platforms. Happier employees rank doing meaningful work as the most important factor to workplace happiness and 62 percent of them have taken a pay cut to find happiness in another role at some point in their careers.

The study also reveals strong gender differences when it comes to work-related happiness drivers. Men are more willing than women to trade additional monetary compensation for better perks in the workplace like on-site gyms, snacks and happy-hours. Women are 126 percent more likely to say "I don't care about perks, show me the money."

While overall, respondents cite compensation as the most important factor to their happiness, men rank "management and leadership" in the top spot. Men are also 63 percent more likely than women to say they have taken a pay cut at some point in their career to accept a job that has made them happier.

Those who report having taken a pay cut to improve their happiness are 63 percent more likely to say they are "mostly happy" or "elated" with their current jobs than those who have not. The happiest employees rank doing meaningful work, flexible hours/the ability to work remotely and compensation as the top three happiness factors, respectively.

Wrike commissioned Atomik Research to conduct this survey. Respondents consisted of adults who work full-time for an organization with more than 200 employees. It was conducted in the U.S., U.K., France and Germany and resulted in at least 1,000 respondents in each country. Respondents were evenly split between male and female. The margin of error fell within +/- 2 percentage points with a confidence interval of 95 percent.

••• pet research

Fido needs fresh

Pet foods go premium

Ingredients and product attributes have become key focal points among consumers as they wander through the pet food aisles – both traditional and virtual. Including fresher and more natural ingredients parallels trends across human food and the sales at the shelf are proof points. According to Nielsen data, consumers spent $33 million on pet food with human-grade products over the past year.

But growth in the pet food arena isn't limited to fresh food ingredients. Beyond fresh, premium offerings such as food with freeze-dried claims are heating up, too. In fact, dollar sales of air-drying/dehydrated full-meal pet food have more than doubled over the past three years, growing from $23 million in 2015 to $53 million in 2018 (making up 1 percent of total dry foods). Freeze- and air-dried/dehydrated pet foods are raw alternative options that are preserved through a drying method (either extracting moisture by vaporizing the ice of frozen meat at sub-zero temperatures or by using warm air for the drying process, respectively).

Consumers are attracted to freeze- and air-dried pet foods because they're usually free of added preservatives and many offer enhanced benefits such as improved digestion, shinier coat, smoother skin and stronger immune system. As with human products that tout enhanced benefits, pet products in this realm come with a premium price tag.

Pure freeze-dried pet food costs the average consumer approximately $33 per pound. Air-dried or dehydrated pet food costs approximately $10-$11 per pound. That said, there is a growing community of consumers willing to pay for premium offerings – and they're actively popping up on shelves in regular kibble products, either as a "coat" on a kibble or being mixed into the dry food as an enhanced offering. For brands looking to ride this trend, investing in education is critical. That's because consumers will need to understand the differentiating benefits of freeze-drying and air-drying/dehydrating and why it's worth a higher price tag.

The meal enhancer subcategory is another growth opportunity as pet owners continue to seek out convenient ways to add nutritional and health benefits to their pet food. Meal enhancers already generate $93 million in sales and they saw more than 25 percent growth year over year.

Nielsen says it is also seeing consumers shift away from food options with artificial products, much like they've done with their own foods. In fact, "free from artificial colors" is the top attribute in terms of absolute dollar growth over the latest 52 weeks.

Lastly, Nielsen has seen private-label products rising in the ranks in pet care. Retailers are launching their own brands across all channels and all categories. In fact, the number of private-label items per store increased from 110 in 2015 to 130 in 2018, representing growth of 18 percent. Distribution of private-label items has grown as well, jumping from 35 percent of all pet retail shops in 2015 to 55 percent of all shops in 2018.

So, who's actually winning the claim game in today's pet arena? Truly, any and all brands that are tuned into the needs of today's consumers and creating products that truly meet those needs are best equipped to persevere. Companies need to evaluate their product portfolios and then understand the impact of ingredients and the level of scrutiny that consumers apply to the products they purchase.

Regardless of whether in human food or pet food, consumers are looking for exceptional products that fulfill a purpose, offer superior value propositions and connect on a personal level. Consumers will stay focused on product claims and ingredient panels, which means all brands looking to remain at the top of the game will need to leverage data to stay in tune with the needs of today's pet-loving consumer.

••• shopper insights

Shoppers spending more in-store than online

Men say in-store tech enhances customer experience

Both men and women are spending significantly more in-store than online during a typical shopping visit according to a new report by technology company First Insight Inc. The company, which surveyed consumers on shopping habits, purchase behavior and influences that drive decisions, found that 71 percent of respondents (72 percent of men; 70 percent of women) typically spend more than $50 when shopping in-store. In contrast, only 54 percent of respondents (59 percent of men; 49 percent of women) are spending more than $50 when shopping online.

Of note, 34 percent of respondents (36 percent of men; 33 percent of women) reported spending more than $100 during a typical in-store shopping visit, compared to only 21 percent (26 percent of men; 17 percent of women) who reported spending more than $100 when shopping online.

This trend continued when evaluating the likelihood of a shopper adding extra items to their carts. When shopping in-store, 78 percent of men and 89 percent of women reporting that they sometimes or always add additional items to their cart. By comparison, a lower 67 percent of men and 77 percent of women reported adding extra items to their carts when shopping online.

"Even as online sales grow, this research shows that retailers must work to strike the right balance with consumers who are shopping differently online than they are in-store," says Greg Petro, CEO of First Insight. "The fact that consumers are less likely to add items to a cart when shopping online implies that online recommendations are not as effective as they should be. Retailers need to be sure to offer the products consumers need and want at the right price points no matter where they are shopping, and must continue to work to drive traffic in-store where consumers are willing to spend more."

Other significant findings of the survey include:

More consumers only go in-store when they need something. According to the survey, 73 percent of men and 69 percent of women respondents said that they only shop in-store when they have a need for something. Far fewer of both groups (64 percent of men and 56 percent of women) said the same about online shopping. The data points to the fact that retailers and brands, to be most effective and capture greater sales, need to place greater priority on the overall shopping experience. To attract consumers into the store beyond buying necessities, retailers must focus on in-store pricing, incentives and having the right items available in-store.

More men than women say in-store technology enhances the shopping experience. According to the report, men and women have begun to diverge slightly in their usage and enjoyment of in-store technology, with men using magic mirrors, interactive windows, smart fitting rooms, virtual technology and beacons more often in-store than women (between 40-47 percent versus 33-40 percent). Further, more men felt in-store technology enhanced their shopping experience across every technology.

Men are more likely to buy clothes in-store than online but both men and women purchase technology online. Clothing is a top category for both online and in-store purchases for both men and women. However, more men are shopping in-store for clothing than online. While an equal share of women purchase clothing online and in-store (73 percent), 66 percent of men say they make their clothing purchases in-store, versus 59 percent online.

By comparison, the survey showed that both men and women prefer to purchase technology items and gadgets online. Fifty-two percent of men and 43 percent of women purchase technology items online, versus 36 percent and 34 percent, respectively, who buy these items in-store.

The findings are based on the results of a consumer survey of a targeted sample of more than 1,000 respondents and was fielded in February. The survey was completed through proprietary sample sources amongst panels who participate in online surveys.

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IN FOCUS

Product and Service Update

••• shopper insights

MFour product captures in-store feedback

Focuses on unprompted shopping trips

Irvine, Calif., company MFour Mobile Research has introduced Product-Check, a new offering that captures consumers' opinions and feelings about products and displays at the moment they are standing in store aisles looking at them, allowing brands and researchers get immediate data on product placement and visibility, whether packaging stands out and attracts and whether the product's in-the-moment shelf appeal is enough to influence intent to purchase. Clients can also gain intelligence on how shoppers perceive competing products and brands. ProductCheck focuses on natural shoppers, not recruits, using validated, first-party consumers who've gone to the store naturally, without prompting. In-store surveys fielded through MFour's Surveys On The Go mobile research app screen for natural category intenders, who are then prompted to go to that category's aisle and continue answering the in-store survey.
mfour.com

www.quirks.com/articles/2019/20190604.aspx

••• shopper insights

Nielsen, JD.com debut online pricing solution

Aims to enhance promotional efficiency

Nielsen, New York, has signed a strategic cooperation and data sharing agreement with e-commerce company JD.com and the companies have launched Online Pricing Optimizer (OPO), a pricing and promotion solution that helps brands better understand online consumers, such as what product they compare with before making a shopping decision; the proportion of different promotions in the overall discount; and the impact of each discount on consumer shopping decisions. Based on the analysis of pricing and discounts, OPO provides suggestions for long- and short-term pricing promotions. OPO can analyze the factors influencing consumer decision-making at different level of the pricing and promotion strategies. It can restore consumers' shopping decisions, find the factors that drive sales through pricing and promotion and give professional suggestions to enhance the brands' promotional efficiency on the JD.com platform.
www.nielsen.com
corporate.jd.com

••• the business of research

Pilot program aims to show MR how blockchain works

Includes consumers as well

Measure Protocol, a blockchain-powered marketplace, has partnered with market research companies and brands to launch a pilot program that will show how blockchain works from the research industry and respondent perspective. As part of the pilot, consumers will be able to download an early version of the Measure app where they can register an account, provide profile and data sharing options, receive offers to participate in surveys, enable passive data sharing and redeem rewards. Over the pilot period, consumers will be incentivized to participate in various data jobs and provide feedback on the marketplace dynamics. Goals include: demystifying how to operate survey outreach with a blockchain protocol and a step-by-step unveiling of what this workflow involves; providing information on how users and respondents behave in a blockchain-powered survey ecosystem; enabling program participants to ascertain the potential of working with blockchain in the future; and offering insights into consumer attitudes and opinions toward the importance of privacy, data sovereignty and transparency.
www.measureprotocol.com

••• pricing research

Harris Interactive adds pricing capability to new product development suite

Van Westendorp, Gabor Granger

In London, research agency Harris Interactive has added Price Express to its New Product Development Express suite. Price Express allows companies to establish ideal price points and price elasticity and apply consumer insights to determine costing strategies for products and services. It covers two established pricing methodologies that can be easily accessed via a standalone pricing survey, combined with concept/proposition testing or included alongside fully bespoke content. Researchers are given a view of

the outputs on a dashboard. The pricing methodologies include Van Westendorp (Price Sensitivity Meter) and Gabor Granger. Van Westendorp enables companies to determine an acceptable range of prices for a product or service to generate an optimal price point, while Gabor Granger determines the price elasticity of products and services. The expansion also includes Price Scout, a segmentation of consumers based on product and price motivations within a category. Price Scout helps to establish marketing, communication and pricing strategies in line with consumer psychology.
harris-interactive.co.uk

••• Briefly

■ San Francisco-based workforce feedback and analytics platform Survale has launched SurvaleRewards, a new feature that allows clients to thank candidates, increase response rates, boost employer brand and generate revenue from feedback efforts. SurvaleRewards pulls promotional codes from the employer's e-commerce platform and delivers them to job seekers after they finish providing feedback on job applications, interviews, offer letters, onboarding, employee experience and more.
survale.com

■ Toronto-based consumer intelligence firm Maru/Matchbox has launched its Implicit Association Test solution, which captures consumers' immediate gut instinct or subconscious responses to brands, campaigns, new product concepts, packaging designs and other related outputs.
marumatchbox.com

■ The University of Tübingen in Germany has announced a master's program in machine learning.
uni-tuebingen.de/en/university.html

■ Nuremberg, Germany, researcher GfK and consumer electronics commerce company MediaMarktSaturn have signed an agreement where GfK point-of-sales information at account level for MediaMarkt and Saturn will now be available to technical goods manufacturers. The service will allow manufacturers and suppliers to generate joint development and category planning programs and will provide more clarity about growth opportunities.
www.gfk.com
www.mediamarktsaturn.com

■ Burbank, Calif., cultural insights agency ThinkNow, in partnership with Abasto, a platform for Hispanic entrepreneurs in the food industry, have released a new Latino Brand Authenticity Report 2019 on U.S. Hispanics' buying habits of Latin American food and beverage brands.
thinknowresearch.com
abasto.com

■ Cinema advertising association SAWA, working in conjunction with London-based research firm MESH Experience, have released results from their global study comparing cinema with all other touchpoints, paid, owned and earned. The study captured and analyzed over 4,500 brand experiences from more than 1,200 people across three countries using MESH's proprietary Real-time Experience Tracking approach. The categories covered in the study include automotive, finance, services, FMCG and electronics.
www.sawa.com
www.meshexperience.com

■ Research company xsperient|Segmedica has launched enhanced consumer segmentation scales PersonaSmart and PersonaSmart Health. Based on personality analysis, the scales are applied to consumer or patient research including market segmentation, positioning, message development and testing, customer experience or any other marketing research project. PersonaSmart Health is specifically aligned to health care issues including market segmentation, health care engagement and treatment compliance.
xsperient.com

■ San Francisco-based insight platform UserTesting has launched Product Insight, an application designed to help product teams build better products by bringing customer feedback into every phase of the development process. The application allows product managers and other non-researchers to make decisions based on customer insight and receive feedback without delaying the timeline of a project.
www.usertesting.com

■ Auckland, New Zealand, research solutions firm Infotools has released a new e-book, *A Buyer's Guide to Market Research Analysis Software*. The free publication outlines considerations and questions to ask when deciding on technology investments.
www.infotools.com

■ Los Angeles-based online research company SoapBoxSample has launched the CANNApinion Poll, a research solution that provides a platform for the cannabis industry to ask target audiences relevant questions, allowing them to discover emerging trends and areas of opportunity. A new wave of the CANNApinion Poll will run every two weeks and consist of eight to 10 questions. Clients can submit multiple-choice questions, open-ended questions and display product images or videos.
www.soapboxsample.com

■ The Path to Purchase Institute (P2PI), a member-based community for consumer goods professionals and a division of business intelligence platform EnsembleIQ, launched *Rise*, a new industry magazine, in May. *Rise*, an acronym for "Retail Intelligence for the Strategic Enterprise," will combine P2PI's publication *Shopper Marketing and Consumer Goods Technology*. It will focus on best practices in consumer engagement, retailer relations, insights and analytics, enterprise excellence, emerging technologies and corporate strategy.
p2pi.org

■ Voxco Survey Software has launched its new cloud-based dialer, with a hosting option now available for clients who don't need to host their dialer on-premise.
www.voxco.com

■ New York-based research and analytics firm M Science has launched its consumer electronics sector coverage. The offering provides product-level pricing, unit counts and dollar volume visibility across

multiple end markets, including video game hardware, streaming devices, smart speakers, wearables and action cameras. Insights cover both retail and online channels, including Amazon, Best Buy, Walmart, Target and direct sales across multiple additional merchants.
www.mscience.com

■ Consumer intelligence firm Maru/Matchbox has launched its digital media measurement solution. Its digital campaign evaluation approach provides a better understanding of how content, channels and brands interact to deliver effective communication.
marumatchbox.com

■ Research company Ipsos has launched Simstore, an online automated platform that provides a suite of virtual shopper and packaging solutions. The platform offers realistic scenario testing, including 2-D and 3-D shelf views, 360-degree store views and e-commerce views.
www.ipsos.com

■ The Organisation for Economic Co-operation and Development (OECD) has released its 2018 Risks that Matter Survey, implemented by Germany-based digital data collection company respondi. The survey, which polled a representative sample of 22,000 adults in 21 OECD countries, provides insight on people's social and economic concerns, how well they think government responds to their needs and expectations and what policies they would like to see in future.
www.oecd.org
www.respondi.com

■ Port Washington, N.Y., researcher The NPD Group has launched its Price Permission tool to help retailers understand where they have permission to price differently from the rest of the market and gain dollar share. The tool analyzes item pricing and buying behavior online and in-store based on NPD's weekly store-level-enabled point-of-sale data.
www.npd.com

■ San Mateo, Calif., company SurveyMonkey has expanded the survey text analysis capabilities of its product platform with new AI-based features that use machine learning and natural language processing technology. The newest feature on the platform includes Sentiment Analysis, which provides insights by automatically classifying text responses and displaying an aggregate view of respondent sentiment. Word Cloud, an existing feature, has been upgraded to help customers draw insights behind text responses by visualizing the most common words and phrases without manual coding or tagging data.
www.surveymonkey.com

■ MFour Mobile Research, Irvine, Calif., has launched ExperienceCheck, a market research product built to help retail and restaurant brands identify and eliminate shoppers' in-store pain points. The product uses GPS-enabled location-triggered surveys to gain feedback from consumers just after they leave a store or restaurant and capture their in-store shopping experience, providing brand executives and marketers with a read on what needs to be improved or optimized.
mfour.com

■ Toronto-based research technology platform Methodify will utilize AI-powered chat bots to help understand customer opinions and motivations through a partnership with research company Elsient and its Conversational Research Insight System, which uses AI and machine learning to conduct one-to-one text-based interviews at scale and report results.
www.methodify.it

■ Madison, Wis., qualitative research firm Digsite has launched Live Video Sprints, a tool that automatically recruits and schedules real-time interactive video interviews within 24 to 48 hours. Digsite's live interview capabilities include an integration with Voxpopme, enabling automated video transcriptions, text analysis and clip reel creation.
www.digsite.com

■ San Francisco-based tech firm Insights Curry has launched Xtab Builder, a cloud-based reporting platform that helps researchers independently manage reporting work for their projects. The platform helps with data processing as well as generating PowerPoint and Word reports.
www.insightscurry.com

■ The Market Research Institute International, in cooperation with the University of Georgia Center for Continuing Education, has introduced a new online course, "Market Research Design and Data Identification." The course will be taught by Susan Frede, owner of Frede Research LLC, research director at Aimpoint Research and an adjunct professor at Northern Kentucky University.
bit.ly/2IWzu8V

■ San Francisco-based survey research and data analytics company College Pulse has developed a real-time data analytics platform to track and predict U.S. college students' opinions, interests and buying behavior.
collegepulse.com

■ Survey research company HarrisX has launched its 5G Intelligence Platform, which will trace the impact and adoption of 5G among wireless and wireline consumers, households and business decision makers.
harrisx.com

■ Roswell, Ga., research firm Moore & Symons has introduced pop-up focus groups, a service that allows the company to set up and conduct focus groups anywhere using a table and Wi-Fi.
mooresymons.com

■ Reston, Va., firm Comscore has expanded its box office measurement service into West and Southern Africa. The expansion will provide data for nine African countries, including Nigeria and South Africa. The service will capture more than 95 percent of all revenue and admissions in each of the nine new countries.
www.comscore.com

■ Burbank, Calif., cultural insights agency ThinkNow has released The Future of Vehicle Ownership: 2019 Purchase Trends Report. The national online survey of adult consumers covered topics including vehicle purchase intent, purchase dynamics and awareness, usage and future usage of technology-driven products in the auto/transportation category.
thinknowresearch.com

■ Alpharetta, Ga., sample solutions firm P2Sample has published a new e-book, *The New Reality of Online Sample: What You Need to Know*, available for free on the firm's Web site.
www.p2sample.com

INNOVATIVE PRODUCTS & SERVICES

Methodologies, techniques and technology are rapidly changing in the marketing research and insights industry. New products and services are being released at an ever-faster pace. How can you keep up on what is new? Quirk's has you covered. In this section, you will find some of the newest and most innovative tools and services to keep your research up to speed. From the latest in software, technology, methodology and services, these are the products and service you will want to know about.

Toluna is the only insights provider uniquely designed to empower today's on-demand economy. We are powered by the perfect fusion of expertise, technology and community, which we use to connect businesses and consumers to deliver insights on-demand to companies of all sizes.

Researchers and marketers are finding the on-demand help they need through Toluna's QuickCommunities. This is a revolutionary DIY platform enabling brand managers to create highly engaged, branded, Web-based communities in just minutes, recruiting the perfect, targeted audience from the Toluna backbone – its global community of 22 million members – all in real-time. By bringing together just the right mix of consumers to provide insights on specific issues, brand managers are creating custom, thoroughly engaging community experiences for members.

It is a qualitative solution that allows users to obtain deep, actionable insights when they matter – in real-time. More often than not, today's brand marketers need actionable information and insights in real-time in order to stay abreast of the competition. Now they can turn to QuickCommunities for on-the-spot insights and real-time decision-making. That's the perfect solution for the on-demand marketplace.

corporate.toluna.com

7 ways P2Sample's platform solves your panel and sample management challenges

P2 SAMPLE
POWERFULLY PROGRAMMATIC

What if you had a single interface where you could efficiently and easily manage all things panel and sample? That's exactly what P2Sample's fully integrated, fully automated solution for panel management and fieldwork offers. This sophisticated platform empowers users to take advantage of built-in automation to better manage everything from respondent recruitment through bidding and feasibility to project execution.

P2Sample's platform solves many common challenges in the industry, prioritizing flexibility, ease of use and proprietary tools to improve respondent experiences. Here are seven things the panel does to make your life easier when it comes to sample and panel management:

Connections galore. Manage proprietary panels and programmatically integrate with more than 200 sample providers, with pre-existing connections to the industry's largest panel companies, exchanges and marketplaces.

Detect fraud. Achieve better-quality data due to P2Sample's AI-based fraud detection and respondent engagement systems to every respondent on the platform, regardless of his/her source. This means the responsibility for any issues related to fraud or engagement is removed from the buyer.

Find respondents. Access 50+ million deeply profiled and engaged consumers across 150+ countries, targeted with the power of P2Sample's advanced technology.

Methodology integrations. Integrate seamlessly with traditional and custom data collection systems and multiple methodologies, including eye-tracking, facial coding, non-conscious measurement, video capture and (of course) traditional surveys.

Lifecycle management. Easily manage sample across the entire project lifecycle, from bidding/quotation to field to delivery for easy quota setups, accurate feasibility estimates and lightning-fast launches.

Instant updates. Stay on track using proactive automated alerts and real-time reporting, backed by online help from P2Sample's project experts.

Expert APIs. Reduce risk and resource commitments while fully embracing automation through P2Sample's free API builds.

Add all this to an intelligent pricing model that ensures clients never overpay for sample, contains no additional platform or software licensing fees and has one competitive cost per complete and you have a recipe for success. This platform gives users confidence in knowing they are getting data they can trust, along with the agility to stay ahead of a swiftly changing market.

www.p2sample.com/platform

ThinkNow ConneKt

The multicultural market represents approximately 40 percent of the U.S. population and continues to grow. In fact, the U.S. will be a multicultural-majority nation by 2045, meaning that African-Americans, Asian-Americans and Hispanics together will comprise more than 50 percent of the population according to the U.S. Census. Does your strategy address this important shift in the U.S. population?

Multicultural consumers have an impressive spending power of $3.2 trillion. Reaching these consumers requires data and insights. ThinkNow ConneKt is the insights tool for companies to discover the drivers that influence multicultural consumer decisions. Powered by machine learning and AI, ConneKt combines demographic, behavior and usage data to help you define consumer targets and inform engagement strategies.

Learn what drives multicultural consumers to spend and what categories they outspend the general population. Segment, analyze and engage multicultural audiences using ConneKt.

thinknowresearch.com/solutions/connekt

Xpert Solutions – Limitless automation driven by real research experts

AYTM recently unveiled a best-of-both-worlds automation solution that the industry has been missing. Break out of the limitations of "black box" automation with research tests developed and proven over countless studies that can be easily customized to fit your unique research environment. Then get to the answers quickly with automated analysis that synthesizes the data down to what matters most.

We are currently allowing a limited number of companies to join our beta for Xpert Solutions. You will get special previews of new tests prior to launch, will influence development to better fit your common use cases and get discounts on exclusive tests that are customized to your needs. Throughout 2019, we will launch a variety of expert-created solutions in our Xpert Marketplace including concept testing, claims testing, creative testing and more.

Once released out of beta, Xpert Solutions will be available on the robust AYTM automation platform. Run a full range of quantitative research, collaborate on survey design in real-time and launch complex sophisticated research tests including max-diff, choice-based conjoint, automated TURF, pricing optimization and more in minutes. Gain access to over 40 million consumers via our integrated panel, which provides best-in-class levels of trust and quality and real-time pricing with guaranteed delivery times. Tap into our flexible service options that unlock access to our team of research automation experts when you need them.

Aytm.com

The team at 20|20 Research has been hard at work for more than three years on a ground-up reinvention of its QualBoard enterprise platform. Launched in January 2019, QualBoard 4.0 is ideal for group discussions, individual diaries, long-term communities and more.

With the new version, 20|20 focused on a few key issues in digital qualitative, specifically trying to move the needle in three areas. First, the company wanted to eliminate the one-and-done project model and give clients the ability to build a data asset by collecting insights in project repositories. Second, 20|20 has focused on saving researchers valuable time by providing automation enhancements and using AI to maximize efficiency within the platform. Lastly, they wanted to give clients the flexibility to design nimble projects and explore themes as they emerge without being limited by technology or pricing.

www.2020research.com

Global leaders in market research facilitation

Conducting successful market research studies is no easy feat. Insights professionals around the globe face ongoing challenges in adapting to the needs of both their clients and respondents in a modern world.

As such, Civicom Marketing Research Services exists to aid market researchers by offering contemporary market research solutions and options to enhance the research process. Services include facilitating telephone and Web-enabled in-depth interviews and focus groups through Civicom CyberFacility®, conducting respondent activities using Civicom Chatterbox®, an asynchronous research platform for online communities and bulletin boards and accelerating analysis by effectively managing a multitude of data using Glide Central®, our online qualitative project management and video curation platform.

Civicom also offers extensive mobile research solutions like the Civicom ThoughtLight™ mobile insights app, a mobile qualitative tool for collecting in-the-moment insights; Front Row™, a mobile Internet-driven research solution that allows live, two-way, remote interviews using a smartphone or tablet; and See Me Navigate™, a qualitative solution for mobile Web site and app usability testing.

Civicom operates in over 96 countries and includes translation and transcription services plus respondent recruiting through CiviSelect™. We are a Strategic Alliance Partner with Schlesinger Group.

What differentiates Civicom from other marketing research services companies is our dedication to service quality, our 24/7 customer support and our drive to meet and act on clients' ideas and requests.

Your Project Success Is Our Number One Priority.

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Civicom
MARKETING RESEARCH SERVICES

CCam focus
HD 360 Tools • A Better Way of Seeing Things

HD 360° focus groups with integrated video curation tools

CCam focus is at the cutting edge of facilitating how you record, stream, organize and analyze qualitative insights from focus groups.

Our 360° camera and omnidirectional microphones are paired to deliver crystal clear audio and high-definition visuals for a truly immersive streaming and recorded experience. Viewers can simultaneously experience both a panoramic and active speaker view. Whenever there are speaker changes, the 360° camera automatically adjusts its focus to provide full-face views of the most recent two to three speakers. Respondents and moderators are unaffected by the camera's unobtrusive presence in the center of the table.

When you need a flexible solution that works just as well in a home or hotel setting as it does in a facility, our camera's plug-and-play setup is ideal. It can be optimized for a specific space just as easily as it can travel. After focus group sessions, you'll receive video deliverables within minutes no matter where you've recorded.

We've integrated these innovations in recording with a built-in project management solution, video curation tools and personalized service and support to deliver an unparalleled end-to-end solution from facility to client presentation. Within the CCam platform, you and your team members can access a project schedule, watch a live stream, review recordings and curate your content. Commenting, tagging, clipping and storyboards are just some of the features that will enhance collaboration and insight discovery. Our innovative, proprietary solution was built with both enhanced security and usability in mind.

CCam focus. There's a better way of seeing things.

Ccamfocus.com

SMS Insights

SMS Insights is the future of market research and data collection brought to you by Precision Opinion.

At SMS Insights, we harness the power of text messaging to bring your research into the hands of your audience, no matter where they are at any given time. Our user-first approach enables us to apply bleeding-edge permission, authenticity, transparency and time-value tactics to experience higher engagement rates and quality insights like never before.

Our thesis for the modern-day humanistic and holistic experience lets us achieve an astounding 28.9 percent engagement rate, while maintaining a 100 percent TCPA- and carrier-level compliance.

Did we also mention that SMS Insights can cost a fraction of what current market research costs your firm today?

Contact us now to start the conversation and find out how we're transforming the art of data collection and insights.

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Samplify

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Are you looking for the power of quality insights at your fingertips? Gain 24/7 access to integrated market research tools and technology, from authoring your own survey and selecting your target audience to advanced data visualization tools – all with Dynata's Samplify platform.

This easy-to-use platform allows you to instantly obtain insights from Dynata's first-party data, whether you're new or further along in your market research career. You'll reach specific audiences amongst millions of opted-in consumers worldwide with your target attributes. The intuitive drag-and-drop survey tool makes authoring questionnaires fast and easy.

Leverage this solution to ensure you're uncovering the data-driven insights necessary for a competitive edge and informed decision-making.

Discover what Samplify can do for you at Dynata.com/samplify.

AI+

Target Research Group's AI+ is a pioneering approach for agile product design and delivery utilizing its new software technology, Product Knowledge Graphs (PKG).

While traditional consumer research has relied on liking and sensory measures for decades for product development, it has proven costly and slow with limited actionable insights.

With PKG, there is no other upstream platform which exists for recipe innovation based on scientific methods. It is the latest in machine learning and database technology for the developmental cycle of a product without guesswork. Its flagship software solution enables researchers, product developers and food scientists to effectively manage, monitor and design products using powerful recommendation algorithms.

By providing access to millions of data points comprised of compounds, flavors, health effects and metabolic pathways, it provides early-stage ingredient, flavor and recipe development, enabling the discovery of new ingredient pairing, flavors, recipes, health statements and much more.

Its comprehensive undertaking begins with retrieving data from all available sources. This includes trend analysis, the cloud, the government, Nielsen/IRI, sales information and other types of research. Data is driven and specifically tailored to your brand's needs.

It then connects and aggregates these large multiple, disparate data sources along with manufacturing, ingredients, nutritional and traditional product research data. It then cleans, connects and custom models the data to begin assembling building blocks to meet the research objectives.

With the PKG algorithm, our models generate new product configurations as well as changes to existing product formulations. Therefore, if one desires a healthier product, AI+ will generate a specific new ingredient composition with healthier ingredients. We would then measure the appeal of the new composition relative to the existing product.

PKG provides a 60 percent reduction in the overall process of product innovation. It reduces time and cost of R&D planning and product development, thus creating a new way of looking at how to create winning products that delight consumers. It lives and breathes science and understands and relates to food palates and consumer acceptance.

In conclusion, AI+ provides new flavor profiles targeted to meet consumer preference and expectations while increasing success rates and reducing development cycles.

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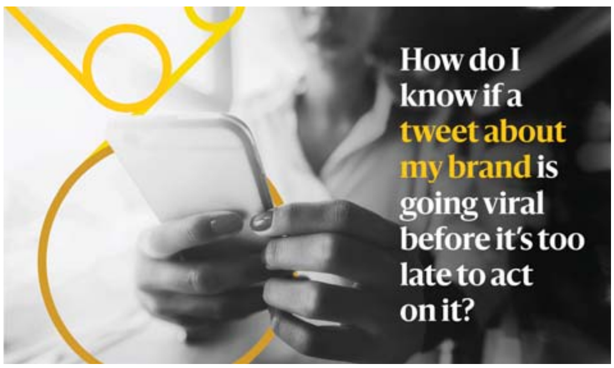
Fizziology's AI-powered social monitor

If you've ever used social media analytics, you know how hard it is to keep up with the unending pace of social conversation. You can get lost in dashboards and hung up on hashtags, missing what's really important.

And what is important? It could be that one tweet that means headaches for your corporate communications team next week or the post that the digital marketing team could use to drive engagement – if they act fast.

Speed is critical. Finding the social posts that matter as they happen has been a constant challenge for digital research and insights teams everywhere. To tackle this all-too-common pain point, Fizziology created VelocityWatcher™, a real-time monitor that uses AI to create an early warning system for sudden changes in the social conversation around your brand, category or competitor. It monitors the real, organic conversation taking place outside of owned social channels, including the complaints, comedy and potential crises that don't pop up as notifications.



So anytime there's a tweet that goes viral and doesn't tag your brand, you will know about it.

VelocityWatcher does not require training, staffing or technological commitments. Fizziology analysts create the monitoring system, analyze the alerts and notify your escalation teams however you prefer, whether by phone, e-mail or a messaging platform such as Slack. This eliminates false and irrelevant alarms and minimizes your time commitments.

VelocityWatcher is a multi-industry solution for media and entertainment, sports, travel and tourism and lifestyle brands. It can be used by digital marketing departments, publicity and communications teams, crisis response teams, consumer insights groups and ad agencies.

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A framework for using modeling for new product valuations

| By Sanjay K. Rao

snapshot

Sanjay K. Rao gives an overview of a survey-based approach to assessing the value of specific product features.

Understanding how consumers make purchase decisions is crucial to assessing a product's value. Equally important is a rational method to allow value to be parsed into constituent components of the product so that strategic decisions about product component value are enabled.

This article outlines a marketing research approach to determine how customers of a smartphone value its specific features as well as that of its competitors, what value they impute to such features and how a marketer can monetize such valuations.

A version of the method discussed in this article was implemented by the author in a landmark litigation matter (Apple Inc. v Samsung, case No. 11-CV-01846-LHK 2014) to determine component valuations for smartphones, tablets, digital media players and laptops. The jury awarded damages to one party according to estimates derived by the method.

Vital for strategic purposes

Assessing the monetary value of a product, its components, a portfolio of products or a business entity with a collection of such assets is vital for a number of strategic purposes such as creating valuable products, pricing products on the basis of value, structuring deals for mergers and acquisitions, in/out licensing assets, estimating royalty rates, damages and verifying claims in intellectual property litigation.

In the rapidly evolving digital age the science of assessing such value has demanded new methodological approaches. The reason for this stems from the unique nature of relatively complex product offerings that are becoming available. Smart digital devices, online product and service offerings, telecommunication packages, consumer financial products, specialty biotechnology products or medical devices, for example, contain a multitude of components, many of which represent complex, patented innovations.

Even in traditional industries such as automobiles, food and retail, one key trend is the availability of products that are custom designed by customers who choose from a range of component options, each of which represents finite value. The sellers of such menu-based products thus are faced with the question of pricing selected options to accurately reflect such valuations.

Companies in the biotechnology, high-technology and telecommunications hardware and software industries frequently compete on the basis of innovation, much of which relies on patented technologies and processes. It is not uncommon for such companies to engage in litigation that calls for reasonable component valuations toward setting reasonable royalty rates, determining patent infringement or estimating damages.

Awareness and usage of complex products or their components vary widely among consumers, differentially impacting their utility, usage and value. Consumers of such complex entities are often unaware of some components in the products they have already purchased and many consumers use only a small subset. Some don't much care for some components in relationship to other more ubiquitous components. For exam-

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ple, smartphone users who frequently transfer audio and video files to external receivers are rarely aware of proprietary software embedded in their devices that enables such activities. However, the value of such software to its users can hardly be overemphasized.

Mixed success

For purposes of addressing such issues, prevalent methodologies relying upon techniques borrowed from marketing science and econometrics have had mixed success at best. One major barrier is the fact that newer technologies, complex product offerings and technology-driven products have far more features than those considered appropriate for such methods to provide reliable descriptions of a consumer's buying process, much less predictions of what product configuration would be bought and why.

In addition, many features considered vital to product success are invisible and thus *prima facie* immaterial to consumer value perceptions. This compounds accurate value measurement through the use of such methods. Even if a method was designed to expose a potential consumer to a product as defined by all of its features (such as by using a prototype), the all-too-real fact of consumer fatigue in processing the information available to him/her has been known to confound attempts at estimating value. This is a key issue when the goal is to estimate value of features that are less ubiquitous to the potential consumer, such as a chipset and software combination in a telecommunications device that enables instantaneous transfer of audio/video content to an external speaker or screen.

The most common method for assessing value of features in a product typically involves use of a time-based database of transactions containing information on consumer purchases of one or more products and other ancillary information as may be appended (such as prices and discounts) compiled by a manufacturer or an independent data supplier.[1] Such a database is used to derive estimates of utilities consumers may have placed on features of products included in it. Such feature utilities are then assumed to represent feature values, either in and of themselves or in some proportion. This approach, while convenient in that it uses data that are already compiled and available, is fraught with limitations. For one, feature value estimates are necessarily a function only of products included in the database, the frequency with which relevant transactions occur per product, the prices consumers would have paid for any product at the point of purchase and the impact any marketing promotions may have had on the purchase decision during the transaction – regardless of intrinsic value.[2]

Further, the use of a retrospective transactional database, by definition, precludes a rational assessment of value imputed to features of a new product yet to be available in the market – particularly one that its manufacturers consider to be unique and highly differentiated from what was available in the past. The use of such a retrospective database for value estimation is, also by definition, unable to capture the decision-making process in which a customer would reasonably engage to make a purchase decision – information that is vital to assessing the value placed on key features of a new product and, by extension, on the new product as a whole. Such business and marketer needs are best captured by marketing research that is customized to the new product, its potential customers and the decision-making process in which they will likely engage to make a purchase decision in the context of a realistic competitive landscape.

Case study

Consider a business situation where a global smartphone manufacturer is interested in assessing the monetary value of patented technology innovations that are part of an audio-video suite of features in one of its flagship products. Most, if not all, such features (although essential to the totality of benefits provided by the product and undoubtedly contributory in some way to its perceived differentiation) go unnoticed or are too technical for a mainstream smartphone consumer to impact its demand per se.

The manufacturer, however, thinks otherwise. Indeed, the product's marketing team believes that if and when the benefits provided by such features are clearly communicated, they would form the basis for sustainable differentiation. Additionally, an accurate consumer-based valuation would define a range of price premiums likely to capture the inherent, incremental value of such features over and above what is offered by prevailing competition.

Given that the product can conceivably be defined by at least 50-100 features (of which the features under examination are but a small set), the use of traditional stated response-based consumer decision modeling exercises such as full-profile conjoint/choice model analyses is inappropriate for estimating consumer utilities. While secondary data on consumer transactions are available for the product and its competitor, they suffer from common biases idiosyncratic to retrospective scanner-like data, key among which is the inability to represent the decision-making process that leads a consumer (or more likely, consumer segments) to determine the value of any feature and make a product purchase subsequently.

To tackle such challenges as specifically and rigorously as possible (and so to provide recommendations that could be implemented for developing reliable pricing and differentiation strategies), the author and his colleagues developed, tested and successfully made recommendations from a custom, survey-based framework and process.

In essence, the framework is based on a new approach to measuring consumer imputations of the relative worth of two or more characteristics in a product or service. The mathematical basis for the approach was first postulated by Thurstone (1927, 1959) and later modified by David (1969) and Louviere (1991).[3] Variations of the approach have since been used in marketing research applications enabling product development and optimization in the automobile, food, computer hardware and services industries.

For the case outlined here, the basic framework was modified and a random sample survey of a statistically representative sample of consumers was designed and executed to collect data. The questionnaire contained a decision modeling experiment, responses to which were subsequently modeled through random utility models to determine consumer valuations of the features of interest. Such valuations were then monetized to develop component value stacks.[4] Such value stacks were then used to determine pricing strategies that capture full or part of the estimated value.

At its core, the method relied upon the conceptualization of Thurstone et. al. of how a consumer may attribute utility to one feature over another in any collection of features that constitutes a product or a service.

Consider a product in which a respondent evaluates four features A, B, C and D. If the respondent says A has the most value and D has the least value, these two responses provide information on five of six possible implied paired comparisons, i.e., A>B, A>C, A>D, B>D, C>D, where ">" implies "has more value." Showing multiple sets of four features and eliciting similar value preferences provides sufficient data to ascertain individual value comparisons among all features and their pairings. Controlling for the number of feature exposures, the number of feature pairings and the position of feature exposure enables an unbiased assessment of the relative value of each feature.

The scientific survey of smartphone consumers designed to address challenges outlined in the case study elicited such evaluations, producing sufficiently rich and representative data on consumer feature valuations. Such data were then calibrated and modeled to estimate feature valuations using random utility modeling. Value estimates, after validation, were used to make reliable predictions of how consumers value any one feature, a collection of features or an entire product or service offering comprised of many features.

Results

Figure 1 illustrates one of several key outputs from an application of the new method to the case outlined above. It presents summary details of how value may be imputed to a set of patented innovations in a single smartphone product. The patented innovations represent audio, video, synchronization and other functionality features in the product.

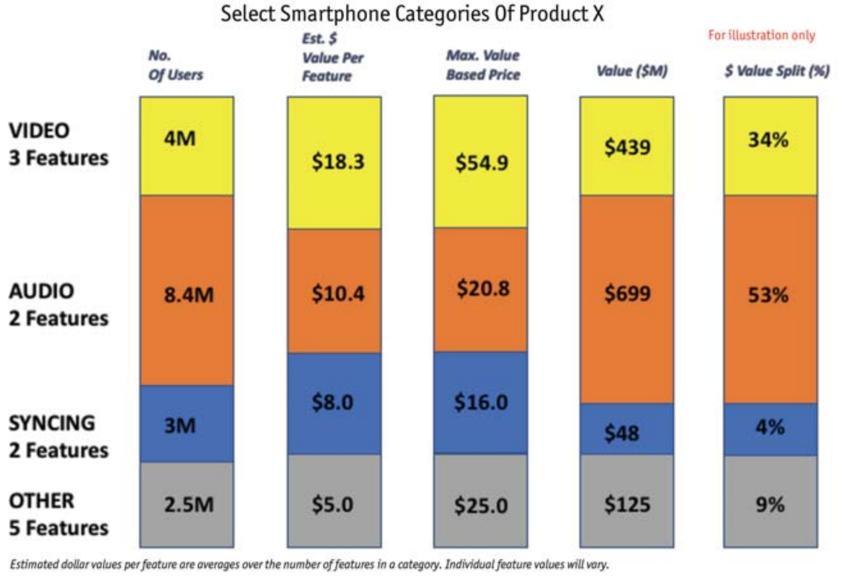

Figure 1: Value Stacks
Select Smartphone Categories Of Product X

The methodology outlined in this article was able to impute a monetary value to each patented feature. Such monetization was aggregated over a relevant set of consumers in a market or one or more of its segments.

The results enabled marketers considering alternative differentiation strategies to focus on innovations that were more valuable and currently underemphasized. In-market pricing strategies could now be developed or modified by considering price changes, discounts or premiums that were proportional to such estimated valuations.

Pricing that better captured the value presented by such innovations was more likely to tally with customer perceptions of value, and – provided differentiation strategy and communication were aligned similarly – likely to present incremental revenue generating opportunities.

When value, differentiation and pricing were thus integrated, marketers could set the stage for increasing sustainable demand, immune to competitive promotional activities that were likely to impact perceptions temporarily at best, rather than cause fundamental changes in how customers intrinsically value what they buy.

Sanjay K. Rao is vice president, Strategic Research Insights, a Princeton, N.J., marketing research and consulting firm. He can be reached at skrao1199@gmail.com.

FOOTNOTES

[1] Databases that contain information on contracts governing products – such as royalty rates and terms for volume based pricing – are also used to determine the financial value of a product or, by imputation, of its constituent features. Such databases also are limited in their applicability to new, innovative and highly differentiated products that are yet to be introduced in the market.

[2] It is often the case in digital device purchases that consumers who do not have a desired feature in their current digital device – but who do impute value to such a feature – will purchase another device containing it in the future. It is also possible that consumers who are not aware of a feature, and therefore do not consider it in making a purchase decision at current market prices, may nevertheless frequently use that feature and inherently value it highly.

[3] See Thurstone, L. L., (1927), "A law of comparative judgment," *Psychological Review*, 4, 273-286; and Thurstone, L.L. (1959), "The measurement of values," *Psychological Review*. Chicago: The University of Chicago Press; and David, H.A., (1969), *The Method of Paired Comparisons*, Charles Griffin and Company Ltd. London; and Louviere, J.J. (1991), "The best-worst or maximum difference measurement model: applications to behavioral research in marketing," The American Marketing Research Association's 1993 Behavioral Research Conference, Phoenix, Arizona.

[4] See Rao, Sanjay K. (2016), "Expert analysis: A new survey-based method for valuations in IP cases," LAW360, May 4.

Empathy, AI and the future of qualitative

| By Nana T. Baffour-Awuah

snapshot

Nana T. Baffour-Awuah offers thoughts on the intersection of AI and marketing research.

What's empathy got to do with market research, you ask? Everything. Particularly now, with AI reinventing so many aspects of every industry today – especially marketing.

Some experts claim that up to 40 percent of all jobs will be replaced by AI in a little over a decade. And even closer to home, a recent Qualtrics report indicates that AI can and will likely be performing many jobs across traditional market research even sooner than that. In fact, the data suggests that within the next five to 10 years, AI will take over tasks such as respondent recruiting and data cleaning.

Maybe it won't be long before AI is not only cleaning up data but actually moderating qualitative research, too? Indeed, this seems very plausible. There are already glimmers of how this could happen when you consider customer service today. For companies like Booking.com, chatbots effectively dialogue with customers, helping them resolve a range of issues and consequently offering a fast, responsive solution for consumers, while freeing up manpower for the company. But an even more telling example of what AI-moderated research could look like is perhaps in Sophia; designed as a companion robot, Sophia displays unnervingly humanlike behavior, has given several interviews and a speech at the UN and has even become the world's first robot citizen.

So, it's not a giant leap to consider that bots could be conducting qualitative research in the not too distant future, because it would ostensibly be a faster, less expensive solution. But would it be better? Perhaps not.

While AI may be able to gather more data and do it faster, it could come at a crucial hidden cost: empathy.

Empathy – the ability to understand and share the feelings of another – is something AI still hasn't been able to truly crack. And it is essential to great qualitative research.

The difference between good and great qual is reading between the lines. It's listening, not just to what consumers say but how they say it; then interpreting what is shared and building on that to get to truly groundbreaking insights that speak to deep-seated wants – what Microsoft CEO Satya Nadella calls "unarticulated needs." That takes clever improvisation, agile creativity and a "good gut" seasoned by experience – all of which are connected to empathy. True empathy is the ability to not only understand consumers but to pause, walk and rest in their shoes for a moment.

And in many cases, the impact of human empathy on qual can start even before the meat of the research. As marketing strategist Evelyn Starr puts it, "Empathy may even serve the qualitative research process before the respondent begins answering, as it is used to make respondents feel comfortable." A good warmup can make or break the quality of insights and a good warmup is one that is always tempered with empathy – whether it is a thoughtful icebreaker exercise that allows consumers to drop their guard or

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simply being able to massage the vibe of the room and start the conversation in a manner that connects with consumers and feels genuine and human. Starr says, "Respondent trust and comfort often correlates with the breadth and depth of what the respondent will share."

Thus, qual without empathy can have big implications, not only for what could be missed beneath the surface but even for what is shared on the surface to begin with. Consequently, the hidden cost that may come with AI-moderated qual could actually turn out to be quite expensive in some instances.

But what does this mean in the context of AI's advent?

It means human empathy should remain foundational to qual research, even as AI advances. Yes, AI may be dabbling in the realm of emotion (and with some success) but right now it cannot duplicate human empathy and we don't know if it ever will.

What we can say for sure is that while AI cannot adequately substitute for empathy in qual it can certainly be a wonderful adjunct tool. Leveraging the advantages of AI could empower researchers to conduct more complex, creative research that pulls in all sorts of data points. Could you imagine for a minute what questions we could ask and answer by combining the vast, growing knowledge of Sophia, the accuracy of AI medical diagnostics and the empathy of a seasoned strategic researcher?

As researchers today, we're at the center of a rapidly evolving golden opportunity. While AI may not offer a meaningful replacement for empathy now, combining AI with human empathy could get us to more complex, nuanced insights about the everchanging consumer –groundbreaking insights which can lay the foundation for bigger, better ideas.

Empathy – the ability to understand and share the feelings of another – is something AI still hasn't been able to truly crack. And it is essential to great qualitative research.

Nana T. Baffour-Awuah is a strategist at New York-based research firm Consumer Dynamics. He can be reached at ntbaffourawuah@gmail.com.

••• the business of research

Know before you go

An introduction to insight strategy

| By James Wycherley

snapshot

The Insight Management Academy's James Wycherley lays out best practices for writing a strategic plan for your insights function.

The customer and market insight function has the potential to transform any organization's performance. However, this won't happen with great research and rich data alone. If you want to transform your organization, you first have to transform your corporate insight team. The first step in doing that is to develop a comprehensive plan, an insight strategy, something which very few companies have.

But what is a strategy? A strategy consists of a description of where you would like to get to and a plan for how you are going to get there.

Classic business strategies will often reference two axes: time and performance. They will define the ultimate goal in terms of business performance and set a date for when they expect to reach it. They will also acknowledge the steps along the way and the potential barriers.

As we shall see later, using the label "strategy" can have disadvantages and insight leaders who have enjoyed careers as market researchers or analysts may feel uncomfortable doing so. If the label gets in the way for you, don't use it. If, as the insight leader at Transport for London recently suggested, the term sounds "a bit grand," consider everything that follows in this article as best practice in writing a plan to transform your insight function and the role it plays.

But if you decide to use the word "plan," make sure that you distinguish this type of planning from the day-to-day exercise of prioritizing activity and allocating resources to projects. These things need to be done but they are no substitute for reflecting more deeply about the role of insight in your company.

Accepted phrases and frameworks

The "strategy" label can also be very useful, because a lot has been written about strategy development and there are accepted phrases and frameworks which insight leaders can adopt. One basic model describes the process usually adopted for corporate strategy development (see Figure 1). This includes:

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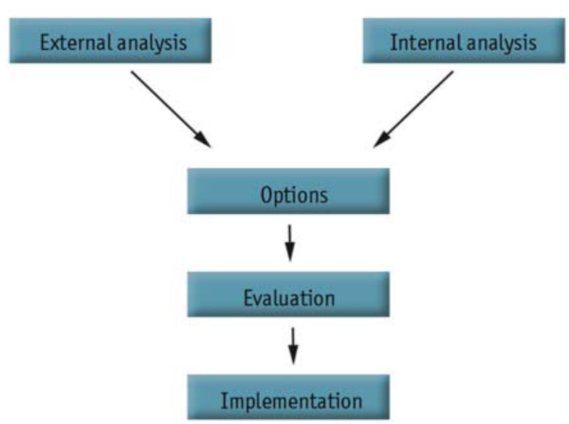
- Analysis of the environment in which the business operates, the opportunities and threats which exist in the external market and the organization's own strengths and weaknesses.
- Identification of options for how the organization could take advantage of the strengths and opportunities and counter the weaknesses and threats.
- An evaluation of the pros and cons of each option, with a resulting recommendation.
- An execution phase during which the strategy will be put into practice.

Our organization, The Insight Management Academy (IMA), was set up in 2004 to support client-side (end-user) research and analysis teams in large organizations. One of our main undertakings is our Insight Forum, which is a group of 40 insight leaders from organizations like eBay, Tesco, Barclays Bank, Nestlé and Asda who share a passion for seeing insight increase its impact.

Figure 1: Basic Strategy Development



The IMA has developed a standard approach to describe what should be in an insight strategy and this aligns with the insight strategy territory in the IMA's Insight Roadmap (see "Time to make a difference," January 2019 *Quirk's*). The same framework is used to benchmark organizations' current level of progress in developing strategies (see Table 1).

A critical place to start

In the absence of an insight strategy, research and analysis activity tends to be driven by what other departments want. A strategy in itself may not change that, of course, but it is a critical place to start.

Figure 2 shows the situation that exists in many companies:

- The business develops a corporate strategy (sometimes with insight's input, often without).
- It translates this strategy into a medium-term plan and/or an annual plan, complete with goals and performance objectives.
- The management teams charged with meeting the objectives initiate a lot of corporate activity (frequently hyperactivity and quite possibly at odds with the longer-term strategy or other departments' goals – but that's another story!).
- Insight teams are then asked to supply pieces of analysis or market research to support other departments' activity.

Many insight leaders will produce and update an insight plan but in many cases these documents (or spreadsheets) simply record the requests received or insight projects to which resources have been allocated. They are very important documents and no insight team could survive without them but they are not designed to transform insight's contribution to the organization, let alone describe how

Table 1: Insight Strategy

An effective insight team has a clear strategy and has made conscious decisions about its scope, scale, goals and development journey.	
Vision	It has identified and agreed upon a compelling, evidence-based vision of how insight could give the organization competitive advantage.
Mission	It has developed an ambitious mission statement to focus its effort and enthuse its insight team members.
Options	It has identified options, and made explicit choices, regarding its scope, scale, goals, resources, activity and output.
Execution	It has a plan for executing its insight strategy and is making disciplined progress implementing it.

insight might transform the organization's performance.

The IMA believes that insight leaders need to move their planning "upstream," ideally developing a plan for insight which either aligns directly with an existing corporate strategy or, better still, examines the data and thinking behind the corporate strategy.

Some business strategies are excellent and some insight leaders (for example those at Suunto in Finland and Sport England in the U.K.) have been intimately involved in their creation at the highest level. For good reason, these insight leaders can develop insight strategies that start where the corporate strategy ends. Other insight leaders are not so fortunate, working in organizations where it is difficult to establish what the overarching strategy is or what is meant by the worthy platitudes pasted on the walls of the corporate headquarters.

Armed with a truly strategic plan for how insight can make a difference, insight leaders can then identify priority questions to address with existing customer and market knowledge or gaps to plug with new market research and analysis. We must engage our key stakeholders at every step, because there is no point in insight pursuing an agenda whose output the rest of the business will ignore. But what is needed is grown-up discussion about existing customer knowledge and new work that could be undertaken, not an order-taking mentality where new research is commissioned without reference to a top-down insight plan.

Define a vision

We will now look at the individual elements in the IMA's strategy template, starting with the need to define a vision. What is a vision? And how is it different from a mission?

Some textbooks use the terms "vision" and "mission" interchangeably. For our purposes we are going to assume that a vision is a statement or a series of statements which describe the desired destination. In other words, what would we like the future to look like?

A mission, and more specifically a mission statement, is a short expression of the insight team's purpose, either at this point in time or along the journey towards the future vision.

The IMA's founder, Steve Wills, believes that it can sometimes be useful to develop two different versions of insight's vision, which may sound confusing but is an idea that resonates with several IMA members: one for the business – that the CEO and senior execs would look at and buy into – and one for the team, to motivate and engage.

The vision to sell to the rest of the organization will provide an agreed-upon, compelling, evidence-based view of how insight could give the organization competitive advantage. It might also reference the analysis and reflection that led to this view: "battlefield mapping" of external threats and opportunities; understanding how the business creates value; a description of how insight can add to business value; the long-term role for insight in the business.

If needed, a second view could provide inspiration for members of the team and encapsulate what great performance and capability will look like. (Insight Forum members have used phrases like: first port of call; recognized as thought leaders; becoming trusted advisers; revenue/profit generators who proactively identify value; the source of "one version of the truth.")

The team's purpose

If the purpose of the vision is to describe what a better version of the future could look like, the mission must capture a sense of the team's purpose in the near term or along the way. Many teams try to capture the essence of this in a single sentence, a mission statement.

The IMA's Roadmap says that an effective insight team will have developed an ambitious mission statement to focus its effort and enthuse its insight team members.

Unlike defining a vision, which many insight leaders find quite challenging, writing a mission statement is something many insight team members feel comfortable doing. If the mission statement is to serve as a reference point for the team, it makes sense for at least some of the team members to have a hand in writing it. Moreover, market researchers are often involved in brand development work for their organizations and are familiar with the process of weighing the impact of words carefully and examining them for nuances.

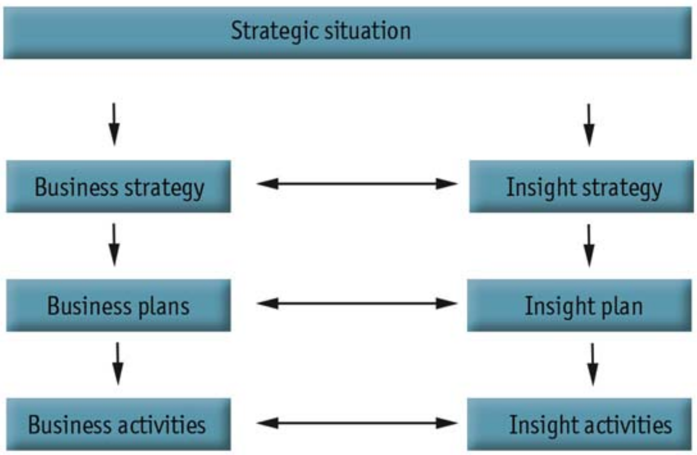
Best practice in writing mission statements is to keep them brief, ideally no more than eight words, and to include a verb, a target population and an outcome that implies something to measure. For example, some years ago one Insight Forum member, Barclays Bank, adopted the mission statement: We will identify value and drive change. The first part of this captures the detective role common to most insight teams; the second part recognizes that identifying opportunities for the business to create more value – for customers and shareholders – was of no use unless insight also succeeded in driving these changes by communicating its knowledge and influencing senior decision makers.

Provide the reference points

Defining a vision of the future and writing a mission statement to capture the purpose of the insight team are key exercises and provide the reference points for other decisions and activity. But they then need to be translated into

Figure 2: The Current Situation

Figure 3: The Ideal Situation



options and recommendations for key aspects of the insight function, including:

- the scale of the decisions which the insight function will influence;
- the scope and type of activity which the function will undertake;
- the resources required to make a difference; and
- the function's relationship with other departments and its measure of success.

The IMA refers to these decisions as "options" because it is important to recognize that, even with a vision and mission in place, there will still be choices to make. No organization is going to make an unlimited investment in insight people and research budget, for example, so what are the different trade-offs that could be made and the pros and cons of each?

These issues start to get us into the heart of why insight teams are or are not effective. Many insight leaders may feel they have no say in the headcount they have or that the scope of the team's activity will remain the way it always has been. It's necessary to take a critical look at all these assumptions at this stage and ask whether they are compatible with the vision that has been defined.

Executing a plan

Not many organizations can achieve such massive insight transformation programs overnight. A typical timescale might be more like three years, so the final part of the strategy template deals with the process required to bring about the necessary change.

Few insight professionals would regard themselves as change management experts and the difficulty of overcoming barriers, of taking two steps forward and one step back, of sensing that victory is in sight only for a wider reorganization to push it beyond arms' reach … all this is the typical experience of leaders.

The problem identified in the IMA's research is that some insight leaders haven't seen the scale of benefits that can accrue from a strategic plan, while being mindful of the barriers which they will face, and this combination of factors deters them from starting. But this is a classic case of "fail to plan, plan to fail." Insight is unlikely to suddenly find itself in a position to transform an organization by accident, so any progress is better than none when the prize could be so great.

The famous Mikhail Gorbachev quote – "If not me, who? And if not now, when?" – seems pertinent. Unless insight leaders believe there is someone better-placed than them in the organization to transform insight, they have a responsibility to take on the challenge. And as there will always be more urgent things to do but rarely something so important, the time to start is now.

Research and reflection

A lot of the strategy development process for insight, as for an organization, involves research and reflection. It is important to have a written strategy but, to reassure you, it doesn't need to be enormously long or complex, providing it covers:

- the opportunity for your organization to improve if driven by insight;
- your vision for the role insight needs to play to achieve this;
- a mission statement for your insight function;
- specific options and recommendations for how the function will operate; and
- an execution plan covering one-to-three years, with shorter-term milestones.

Why is it so important to write it down? There are a number of reasons, including:

- The act of writing forces us to be more specific than we would otherwise be.
- It crystalizes our ideas and ensures they are not lost.
- It provides a document we can show others (but bear in mind that different versions may be appropriate for senior executives, other stakeholders and team members).

Change their plans

A number of IMA members have questioned their ability to develop a successful insight strategy and the wisdom of documenting their plans, when their organizations are prone to reorganizing, which often ends up changing their corporate plans and objectives.

There is nothing an insight leader can do about wider corporate change; it's a fact of life we have all had to adapt to. But wider corporate change does not invalidate the thinking which you do on your insight strategy, nor does it necessarily mean you have to change large parts of it.

To develop your strategies, the first step for insight leaders is to look beyond your organization to the wider market. Then, look at your organization in its market and, later, the decision-making environment within which insight operates. A key reason for this is to focus on the truly strategic situation first, the piece which is least likely to change when a company recruits a new CEO or announces a reorganization.

Rapid change and reorganization shouldn't mean a strategy becomes invalid. Rather, your vision and mission should remain solid and your need to build capabilities and processes are likely to be the same, so much of your strategy should be relatively static. But your strategy should explicitly predict and acknowledge likely change and include content on how to handle it.

Never getting around to it

Earlier in this article we urged insight leaders to avoid putting off their thinking on strategic plans. There will always be something that appears more urgent; waiting for a quiet moment is a recipe for never getting around to it and allowing the present situation to continue. It's unlikely that your board of directors will wake up tomorrow and present you with a golden opportunity.

After talking with the members of the Insight Forum and Insight Network, it's clear there are some notable patterns/situations that provide the impetus for strategy development:

Insight leader new in role. When an insight leader is new in their role, that's a natural point at which to review what an insight function is for and what it does or does not do.

Pressure from senior executive. Sometimes there is a push from above for insight to have more impact – for example, if there is a new CEO who is keen to see the organization be more insight-led – and that can prompt a more considered insight strategy.

Insight leader dislikes status quo. Sometimes it's the insight leader or team themselves who feels the need for things to be clearer or better.

Significant organizational change. Sometimes a major shake-up is what prompts the need for an insight strategy.

Insight leader faces a strategic choice. Sometimes the insight function needs to make a particular strategic choice, for example about its activity or relationship with another department.

A mind-set: How can you manage without one? In other cases, the need for an insight strategy is so well-established that the insight leader and/or their team would feel naked without one.

Checklist for your strategy

To wrap up, here is a short summary of the key points made in this guide, a kind of checklist for developing your insight strategy:

- A strategy is a description of where you would like to get to and how you are going to get there. It begins with an analysis of the current situation and a vision for how things could be very different in the future.
- Many organizations, and insight teams, adopt short mission statements to describe their activity and its intended impact. A vision will never be realized unless it can be translated into some practical options and recommendations for change.
- Change rarely happens overnight so it is good practice to write a one-to-three-year implementation plan showing how you plan to execute the strategy.
- Insight leaders are most likely to write strategies when they are new in role or challenged by an incoming senior executive but if your organization does not have a strategy for how insight can transform the company's performance, there is no time like the present to write one.
- Unless the insight leader thinks there is someone better-placed to develop the strategy than them, it is their responsibility to take the lead.

James Wycherley is CEO of Insight Management Academy. He can be reached at james.wycherley@insight-management.org.

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••• shopper insights

Help them do it for the Gram

The social side of brick-and-mortar retail

By Ed Keller and Brad Fay

snapshot

Tips for brands that want to boost their shareability on social media.

When marketers today hear the word "social" or ponder what it takes to be a social brand, they usually think about online media platforms such as Facebook, Twitter, Instagram and Snapchat. But America's physical, brick-and-mortar retail stores are extremely social places, too, and provide marketers with myriad social marketing opportunities.

According to data from Engagement Labs, nearly 900 million times every week somebody in America is in a conversation about brands while in a store. That's more than three times per week for every American adult and these in-store conversations can be pivotal in helping consumers decide which brand they pull off retail shelves, given their proximity to the actual purchase decision. While private homes are the overwhelmingly dominant location of consumer conversations, at 69 percent of the total, over 6 percent of all such conversations happen in stores, nearly as many conversations that happen at work (8 percent).

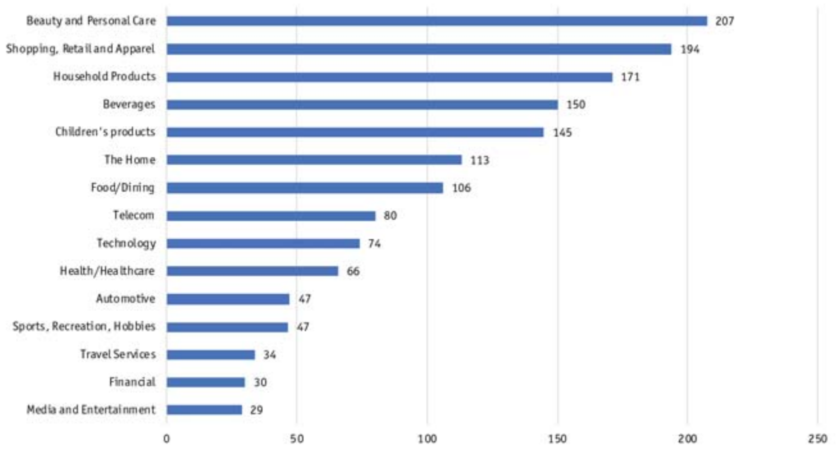
Our firm's TotalSocial platform has been measuring online and offline consumer conversations and their impact on business for more than a decade. Three quarters of in-store conversations happen face-to-face, whether with a shopping companion, a store employee or stranger. One in five happen over the phone (13 percent) or via text message (7 percent), perhaps reflecting a "phone-a-friend" instinct when faced with a tricky choice in a shopping aisle. Another 4 percent happen by social media or e-mail. Face-to-face conversations are more prevalent among women, while men are more apt to use social media and e-mail while in store.

Our analytics, published in the *MIT Sloan Management Review*, show that 19 percent of all consumer purchases are driven by brand conversations, with the greatest impact in the two weeks prior to purchase. Half of this impact comes from offline conversations and half from online discussions in social media. Given the physical proximity of real-world, in-store conversations to purchase decisions, they are especially valuable to marketers.

(TotalSocial incorporates online and offline conversation data on more than 500 U.S. brands. For the analysis presented here, we analyzed data for 12 months ending February 2019. Offline conversation data are collected through a continuous online survey among a repre-

www.quirks.com/articles/2019/20190609.aspx

Figure 1: What We Talk About In-Store
(Indexed to all other conversations)



sentative sample of consumers ages 13 to 69 from whom we measure daily word-of-mouth conversations about brands across a range of categories. The platform also combines these data with social media conversations collected through keyword searches of Twitter, public Facebook posts, blogs, forums and consumer review sites.)

Of course, the value of in-store conversations is much greater for those categories that tend to be purchased in physical retail stores. Just four categories account for more than half of all in-store conversations: retail/apparel (17 percent), beverages (14 percent), food/dining (12 percent) and beauty (11 percent). When compared to all other conversations (Figure 1), beauty and apparel conversations are twice as prevalent in-store versus in other locations. Household and children's products also stand out as getting much more attention in-store rather than elsewhere.

Categories like technology, automotive, sports, travel and financial services get far less discussion in-store. Some of these – sports, media, travel, and financial – make sense given how and where purchases occur. But technology brands would probably like to be at the center of more conversations that happen in stores, since retail locations are an important way for people to become familiar with the latest and greatest products.

The brands that are most heavily represented in conversations at retail reflect the categories that perform best, with big emphasis on retailers themselves, apparel and footwear brands, beauty and various types of consumer packaged goods.

The following brands are three times more prevalent in conversations that occur in-store versus all other conversations: Nordstrom, TRESemmé, Foot Locker, V8 and Dial. More than 40 brands get at least double the conversation in-store, compared to other locations, which means brand managers for these brands – and their competitors – either are or should be designing shopper marketing to maximize the in-store "social" opportunity.

One pattern that stands out is that Procter & Gamble owns the most brands with six among the 40 most "social" in-store brands (Table 1), reflecting the company's long-time commitment to award-winning shopper marketing. The P&G brands punching above their weight in in-store conversations include Charmin, Crest, Febreze, Mr. Clean, Gillette and Old Spice.

As an example of P&G's effective shopper marketing, the company won an Effie in 2017 for a program that featured a wide range of the company's cleaning products, including Mr. Clean and Febreze, in Walgreens stores in "spring cleaning"-themed aisle endcaps.

Unilever is in second place, with four brands among the top 40 – TRESemmé, Dove Men + Care, Axe and Suave – while Johnson & Johnson has three brands and PepsiCo and Nestle each have two.

Influential consumers

One indicator of the value of in-store conversations is that they tend to occur among very influential consumers who have large social networks and regularly make recommendations. Influencers in the categories of food/dining, beverages, media/entertainment, technology and retail/apparel (Figure 2) are commonly found talking in stores about categories and brands, although that doesn't mean

Table 1: Top 40* Brands Performing Better In-Store than Elsewhere

Rank	Brand Talked About In-Store	Index vs. Out-of-Store
1	Nordstrom	367
2	TRESemmé	358
3	Foot Locker	350
4	V8	333
5	Dial	310
6	Under Armour	295
7	Gerber	293
8	Levi's	280
9	Glade	279
10	Miller Lite	274
11	Old Navy	267
12	Hershey's	261
13	Silk	259
14	Charmin	249
15	Dove Men + Care	247
16	Crest	247
17	H-E-B	246
18	Maybelline	246
19	Suave	244
20	Aveeno	242
21	Febreze	240
22	Fanta	240
23	Hollister	238
24	Mr. Clean	237
25	Ulta	236
26	AXE	236
27	H&M	233
28	Doritos	232
29	Tropicana	232
30	Dick's Sporting Goods	227
31	ShopRite	227
32	MAC Cosmetics	222
33	Johnson & Johnson	221
34	Vans	220
34	Gillette	218
36	Old Spice	216
37	Clean & Clear	216
38	Stouffer's	215
39	Kellogg's	213
40	Hasbro	212

**Excludes some brands with small survey sample sizes due to very low talk levels.*

these are the categories that come up in conversation while shopping. Based on our experience, a reason for influencers being prevalent in stores is it is the nature of influencers to be out and about, including at physical retail locations, and they are constantly seeking information including with people at retail settings.

Figure 2: Influencer Categories Talking Most In Stores

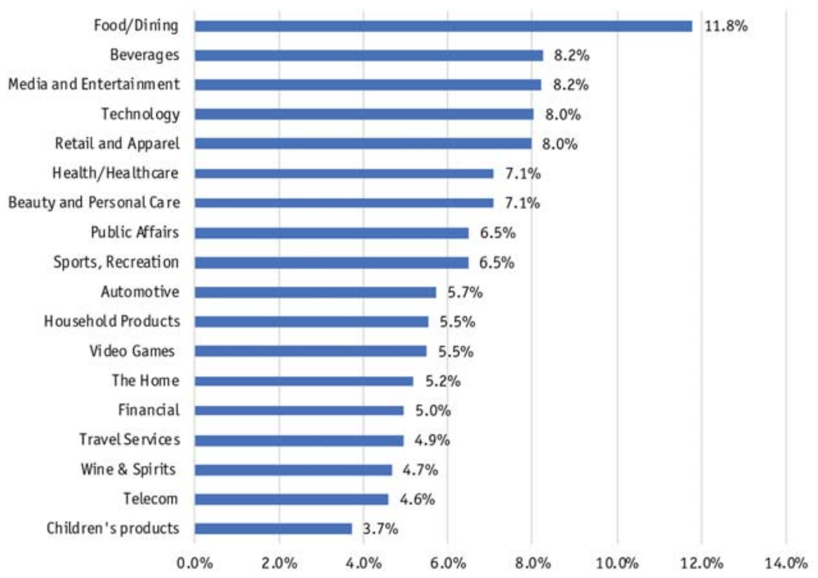
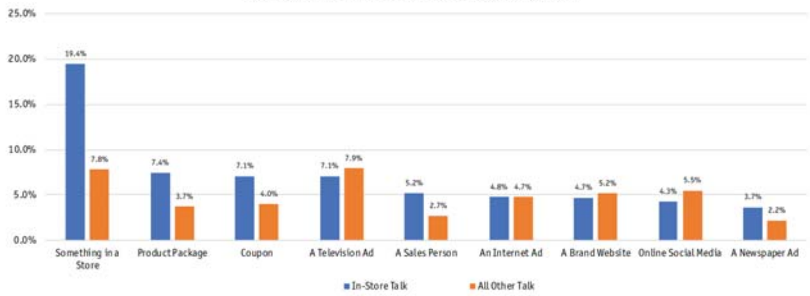


Figure 3: Media that Drive In-Store Conversations



Because in-store conversations happen among influential people and close to purchase, marketers should be very motivated to drive more of them. But how to accomplish that at the critical "last mile" to purchase in brick-and-mortar stores?

One obvious way is with in-store displays. About one in five in-store conversations (19.4 percent) relate to something they have seen in a store, more than any other marketing touchpoint and three times more frequently than in conversations happening elsewhere. Next most important are product packages themselves (7.4 percent) and coupons (7.1 percent).

When designing campaigns, how many marketers are thinking of their in-store displays, packages and coupons as fodder for consumer conversations? Not many, we believe, which means there could be significant opportunity for marketers to drive up these numbers with more talk-worthy messaging (Figure 3).

Our advice to marketers seeking to improve their shopper marketing is to challenge their agencies and in-house teams to add a new objective: to drive discussion and advocacy at retail. Thinking about retail stores as social hubs is in line with the trend toward experiential shopping. As e-commerce takes a bigger bite out of commodity-type purchases, the physical retail experience should be both enjoyable and social.

Here are some specific ideas first for brand marketers:

- Consider investing more in retail displays. These have always been highly valued because of their proximity to purchase but their value is increased by their ability to stimulate discussion among influential consumers, too.
- Messaging at retail should be talkable, rather than primarily about price promotions. Craft your message with language likely to stimulate a discussion. Is your brand advertising coordinated with your shopper marketing to tell the same story? Extend your story in the aisle and complete the narrative of your marketing, not just to sell products.
- Encourage social media posts by making your display fun to photograph and share. How about a display that makes it Instagram-worthy?
- Find opportunities to stimulate conversations at checkout or point of sale among strangers in line through video.
- Use personalization when possible through digital targeting strategies such as personalized coupons or promotions redeemable in-store only.

And here are some ideas for retailers:

- Emphasize "shopping together" experiences. Provide coffee bars with seating and organize "singles" and "couples" shopping nights with special perks for participants. Is there an Instagrammable section at your store to make the experience shareable?
- Create and experiment with spaces at retail by creating community-driven spaces for customers. Why not launch a product sampling and demonstrations with full-blown performances and seating available?
- Use "attention shoppers" audio announcements to generate buzz. Invite the high school drama team to provide an in-store DJ who entertains and engages customers while bringing her friends.
- Train your staff to start conversations, especially about the products customers are buying. They can ask: "Have you tried this before? What did you like about it?" and fellow shoppers who may be listening may try and share too.
- Take some pointers from direct-to-consumer brands and use more digital elements to lure shoppers into the stores.

Tremendously social

Not every idea will be practical for all retailers and marketers but the point is shopping experiences are tremendously social and decisions about what to buy are being influenced by other people around us in the store. Indeed, the social experiences possible at retail could be one of the most important reasons for the relevance of bricks-and-mortar in the future.

Ed Keller is the chief executive officer at Engagement Labs, a data and analytics firm. He can be reached at ed.keller@engagementlabs.com. Brad Fay is the senior consultant at Engagement Labs. He can be reached at brad.fay@engagementlabs.com.

●●● shopper insights

Surviving the retail revolution

Are experiences the key to success in the new era?

| By Fiona Blades

snapshot

Fiona Blades outlines some new tools and frameworks needed for measuring transformation in the retail space.

In our work helping clients understand consumers' experiences, we've witnessed the startling speed with which digital has transformed retail. We spotted the beginning of a trend back in 2011 and watched over the next two years as the percentage of people reporting an in-store experience of any kind for our client halved!

Further digging revealed that people were going online, mainly to retailer Web sites. Moreover, through our research we saw this early in the path to purchase, when they were researching what brand to buy, and towards the end of the journey, when they were searching where to buy their chosen brand at the best price. This insight changed the way our clients worked with their retail partners.

To see what people value most about in-store shopping, we analyzed thousands of retail experiences in our firm's database. Three aspects stood out:

Sampling. Consumption touchpoints are normally the most engaging and persuasive experiences that people have with brands. So, getting to try the product in a retail environment is very powerful.

Speaking to assistants. A great staff interaction transforms a retail experience.

Touching and feeling the product. Reading about the car online isn't the same as sitting inside the car, smelling the leather and holding the steering wheel.

Observations like the above give us clues to how bricks-and-mortar retail can be repurposed: It needs to transform from transactional to experiential.

The implication of this shift is profound. The purpose of bricks-and-mortar retail is no longer to generate sales but to build brands. It needs to be on the media plan alongside TV and other brand-building channels.

Many companies have taken this to heart and we are now seeing brands creating amazing touchpoints in retail. Take Hermes Dip-Dye Laundromat in pop-ups across Europe and the U.S. Customers are invited to bring their Hermes scarves, dye them and fall in love with them all over again. And what about the Magnum Pleasure store, another pop-up which has seen lines around the block as customers await personalized ice cream confections that gleam like jewels?

www.quirks.com/articles/2019/20190610.aspx

What these brands understand is that the experience people have in these stores will have a long-term effect. Seeing and tasting the quality of a gorgeous Magnum ice cream has a greater chance of changing brand perception than being told about it in a TV or print ad. What's more, not only is the depth and quality of experience greater but, with social media, the spread of messaging to friends and relatives means that those who haven't ever been will hear about it.

New frameworks and tools

If retail is transforming, we need new frameworks and tools to measure its impact. While we spend lots of resources on measuring TV advertising, we spend surprisingly little on retail. These are the measurement gaps clients have mentioned:

- We know how much we are spending and what sales we are getting but we don't know whether the activity drove the sales.
- We are spending significant amounts on pop-ups/events/displays and cannot quantify ROI.
- Who is being reached and with what engagement?

Millions of dollars around the world are spent on retail display but when asked by the Path to Purchase Institute how they measured the effectiveness of POP, 53 percent of clients claimed to do so through sales, with no one measuring via technology. Existing measures – from brand-tracking modules to exit interviews, ethnography, in-store video and eye-tracking – all have drawbacks, from poor-quality data to cost.

We believe that in today's world marketers should take an experience-driven marketing approach. We have discovered that share of experience (SOE) (all paid, owned and earned media) has a greater correlation with market share than share of voice so think SOE when it comes to deciding investment levels. A positive experience has three times the impact of a neutral one on brand consideration. So, if you want to grow your brand, ensure you are generating more positive experiences. You can give your brand an unfair advantage through message, placement and context.

In terms of measuring the success of retail activity, we would advocate a couple of points. First, compare the quantity and quality of retail experiences in the context of all other paid, owned and earned media. And, don't stop at sales; measure emotional response to retail display.

New tools can help us. To maximize the impact of retail, it is important to place retail in the context of all your other touchpoints to see whether to invest more here and less elsewhere. More recently, we have started using new, tech-enabled tools within retail displays and have developed a way to evaluate retail display using cameras and algorithms, without video and the need to store personal information.

Here are some of the questions we can start to answer with this approach:

– Does my end-of-aisle display work better than an in-shelf feature?
– Does a brand-building display work better than a price-offer display?
– On which metrics in the purchase funnel does my seasonal display work versus my occasion-led display?
– In which stores does the same display work most successfully?
-- Which days of the week/times of day does my display work most successfully?

Let's look at a case study. For Unilever, we took a store in Sao Paulo where we wanted to assess the impact of a change of store display for Knorr seasonings. There was a new, healthier seasoning range with natural flavorings and 25 percent less salt. To communicate this, there was a shelf hanger "stopper" placed on either side of the product range. We compared two periods to see the change in shopper-display interaction. The first, during November, had no display. The second, during December, had the display material. To contextualize our data, we used Google's Popular Times feature. Of course, for a bigger study, we would envisage putting in cameras to understand footfall to the store and to the aisle and contextualizing with sales data, the weather and other data streams.

We also created specific terminology. A **viewer** is someone who looks at the display for at least a second. **Noticeability** is the number of viewers. **Attention** is how long the viewers looked at the display. **Engagement** is the percentage of the viewers who displayed a happy, smiling emotion while looking at the display.

These were some of the results:

Even with relatively small pieces of display (the shelf stoppers) we saw a massive lift in noticeability, with over three times as many viewers. Of course, we need to better understand why. Maybe more people walked down the aisle? By putting another camera to observe traffic we could account for this.

Noticeability was relatively flat when there was no display (except around lunchtime on weekdays) but for the display period it seemed to stand out around peak times. Did this new information catch people's eyes?

The display seemed to be noticed more by men than women and this was particularly the case during those peak shopping times.

On average people paid attention for just three seconds. And most peak-time views only lasted a second. So, it's important that your message is easy to glean.

The percentage of people displaying positive emotions was fewer with display than no display. Was this because we were capturing the attention of those not looking to buy seasonings? We picked up a variety of emotions so there is plenty more analysis needed to understand how display is impacting on people's emotional responses. For example, are they irritated to be interrupted in their shopping? Even if the display is not generating engagement, since it is getting noticed it should be increasing awareness and therefore longer-term brand-building.

In terms of implications, we are seeing billions spent on display – with a dearth of evaluation. Technology can help marketers understand the return on their investment. With approaches like real-time camera ethnography we can see how many people the display is reaching – much more than store traffic, location matters. We can see whether the display is engaging people and doing its brand-building job. And we can see if the display is converting to sale.

We are living in rapidly changing times when it comes to retail. As the role of the bricks-and-mortar touchpoint transforms from transactional to experiential it is even more important that we provide the measurement tools to match.

Based in New York, Fiona Blades is president and chief experience officer at MESH Experience, a London research firm. She can be reached at fionablades@meshexperience.com.

The magic of tidying up today's retail landscape

Where KonMari meets shopper insights for the #win

| By Lisa Osborne

snapshot

Lisa Osborne looks at what researchers and retailers can learn from applying some of Marie Kondo's methods.

Cleaning and organizing has never been more popular, thanks to Marie Kondo. Kondo, and her KonMari method of tidying, is all the rage. Author of New York Times best-seller *The Life-Changing Magic of Tidying Up* and starring in her own Netflix show, *Tidying Up*, Kondo has built a following by helping others make over their homes, clear the clutter and live a more organized life. But Kondo's approach goes beyond mere cleaning tips and hacks. It's a philosophy grounded in Japanese culture built upon a fundamental principle of finding and experiencing beauty in simplicity and calmness.

While on the surface it may seem like just another "less is more" system, KonMari strikes upon the notion that we must be more selective in what we choose to keep and that we should keep only those items that spark joy in us. All the rest should be let go. In her book, Kondo writes, "We should be choosing what we want to keep, not what we want to get rid of."

As I dove into Kondo's philosophy and practices, the more common ground I discovered with the shopper insights work we undertake. The power of carefully curating a retail experience and helping shoppers more easily navigate and choose their shopping path remains an important principle to drive growth and improve customer engagement. We know from our work with both manufacturers and retailers that the days of near-unlimited assortment and boundless variety within the walls of a single store are fast fading. As Barry Schwartz laid out so well in his book *The Paradox of Choice*, too much choice for consumers, all at once, often leads to lower sales as they become overwhelmed and stalled in their decision-making. One could certainly argue that an abundance of choice is precisely why online retailers such as Amazon are winning but assortment is not the primary reason for their success. No, the biggest drivers of online shopping are functional benefits such as speed, convenience and low prices. In fact, our research has pointed to shopper pain points associated with the seemingly boundless set of options available to them online.

www.quirks.com/articles/2019/20190611.aspx

How we got here

So, what is to be done and how can manufacturers and retailers move forward in the face of these trends? How can we, as shopper insights professionals, help our brands and clients make sense of it all? It appears we could take a page, or many pages, out of Kondo's approach to tidying up. Lessons are there to be learned and I'd like to lay out a few for you now. But before I jump to solutions, I'd like to first take a step back to ground in how we got here and what is motivating such a strong following for Kondo and the magic of tidying up she promotes.

Trend experts will point to the pendulum swing effect when we, as a society, respond to prevailing cultural, political and economic forces. When big shifts in consumer behavior occur almost inevitably there arises a counterforce that swings the pendulum back in an opposing direction. Kondo's popularity is an example of such a swing. For decades, unprecedented levels of consumer activity and increasing disposable income and consumer purchase power have prevailed. We buy a lot of things and accumulate a lot of stuff. The "more is better" mind-set has taken over and consumers are continuously upgrading to newer and shinier. For example, instead of fixing faulty appliances, we just buy a different one. Kondo's growing popularity stands out as a counterpunch against the mass consumption mind-set as it promotes a mindful approach where experiences and relationships are prioritized above things purchased and collected. And this pendulum swing is something that retailers need to pay attention to (some already are!).

Further justification for Kondo's method of decluttering can be attributed to the size of one's living space. In Japan, square footage is at a premium and many are living within a small footprint, particularly when compared to average square footage of homes in the U.S. This alone makes the KonMari method a useful approach as it confronts the reality of living well within a limited amount of space. Kondo offers that a smaller space with more curated joy-sparking objects is actually better for our well-being and happiness. It makes sense in land-precious countries and in urban locations. And, this notion of "bigger as not necessarily better" also applies to today's retail landscape. Of course, big-box stores do exist. Mass merchandisers and warehouse club stores command large footprints to keep inventory of their huge quantities, family-size products and stock up staples. However, many of these same retailers are experimenting with small formats in order to better compete. They are "focusing on shrinking stores."[1]

Walmart is building 3,000-square-foot convenience stores. Similarly, Target has announced plans for over a hundred smaller urban-format stores. IKEA and Nordstrom are also testing smaller showrooms. And, Amazon is planning for 3,000-square-foot AmazonGo locations.[2] Technology to better manage inventory, order online and pickup (i.e., click and collect) is enabling the movement toward shrinking retail footprints. All of these tools are in service of the need to create a more tailored and convenient shopping experience, to pare down and make stores more accessible for today's consumer.

Avoiding nostalgia

Speaking of technology, let's take a closer look at Kondo's emphasis on avoiding the pitfalls of nostalgia. Although it is human nature to reflect fondly on the past, Kondo warns us not to wallow too long or too heavily in these feelings of nostalgia as it can thwart progress to declutter and organize. Author Justine Harrington outlined several lessons to be gleaned from Marie Kondo and one of these was avoiding the trap of sentimentality and nostalgia.[3] Harrington writes, "Going down the rabbit hole of nostalgia can also just be a convenient way for you to procrastinate (yet again!) instead of cleaning – when possible, it's important to bypass nostalgia to figure out what you actually need and what items bring you real joy."

From a shopper insights perspective, this Kondo rule serves as a general watch-out to retailers to keep evolving or risk falling behind. In 2018 alone, retailers such as Sears and David's Bridal filed for bankruptcy at alarming rates. Shifting consumer buying patterns is the oft-cited reason for the retail downturn.[4] I would take this further and claim many of these retailers simply continued to do business as they had always done business, doing little to modernize their model or their merchandising. When retailers get stuck in the past and cling to their old ways of thinking, they die. Those experiencing success are embracing technology in new ways. They are experimenting and seeking ways to complement their physical store locations with a robust e-commerce business.

Pairing brick-and-mortar with e-commerce services plays to the unique strengths of each format. Shoppers can get variety and convenience through search and shop online while brick-and-mortar stores can be curated to improve shoppers' experience. E-commerce provides the functional benefits, leaving storefronts the freedom to tap into the emotional benefits of hands-on-discovery, treasure hunt, personalized service and try-and-buy. Eyeglass retailer Warby Parker is a great example of a successful omnichannel retailer. Warby Parker started as a digital retailer and, through its e-commerce model, changed the otherwise time-consuming chore of eyeglass selection into a fast and efficient process from the comfort of a laptop. In recent years the firm has added 70+ physical store locations to become a "click-to-brick" retailer with showroom capabilities for shoppers to have fun and experience the brand.[5] Amazon is following suit via its acquisition of Whole Foods and experimentation with pop-up stores.

With the rise in online shopping, delivery and pickup or ship-to-store, e-commerce and brick-and-mortar are evolving into complementary tools and a way for the shopper to control their own experience. And, in keeping with Kondo's decluttering advice, retailers adopting a more omnichannel approach are clearly avoiding the nostalgia trap as they evolve and change to suit the needs of the modern shopper.

Fold, don't hang

Kondo calls upon her devotees to embrace a "fold, don't hang" system for their clothing storage. She suggests clothing is always "happier" inside a dresser drawer and even outlines a special folding technique called the vertical fold where you make a long rectangle with your clothing and then fold from the bottom into a small package. The premise here is the ability to see all of your items of clothing without the need to rummage through and dishevel everything.

Folding up for display instead of hanging clothing on racks has improved shopability within department stores and major fashion retailers as well. Our path-to-purchase and in-store shopper research has led us to conclusions and guidance for our retailer partners similar to the advice given by Kondo to her readers.

Crammed-full racks of hanging clothing do not invite the shopper to engage and browse. Instead, retailers are wise to move to wall shelving and freestanding displays where they can fold and stack, where they can draw the shoppers' gaze to eye-level or upwards and showcase their selection, reveal color and inspire outfit component mixing and matching.

And, you don't have to be a fashion retailer to realize the benefits of this advice. One of our non-clothing retailer clients was experiencing a slump in holiday sales on its giftable items. Our shopper research uncovered a store environment incompatible with the way in which shoppers like to browse and buy. Sight lines and displays were not conducive to the navigation patterns in-store and merchandise was primarily displayed on tables, taking the shoppers' eyes down where they would then miss additional products. Stock was literally buried and had no room to breathe and be discovered. A little "fluff and fold" guidance resulted in some serious changes and improved sales in the next holiday season.

KonMari lessons for researchers

It's not just our brand teams and business partners who can benefit from an application of Kondo's teachings. As researchers and practitioners of the shopper insights arts (as I like to call them), we can also benefit from a refresher course in simplification and careful curation.

With almost endless quantities of data at our disposal and a wealth of research tools and methods at our fingertips, we may have a tendency to overengineer our approach to learning. For each shopper challenge or shopper question you face, consider combining the "what" of behavioral data to drive hypotheses around why shoppers are acting in a specific way or buying (or not buying) within a certain category.

It is critical to look beyond sales metrics to gain insight into the underlying needs and motivations of shoppers in the mode of actual shopping. Oftentimes, the best way to do this is to go old-school and engage shoppers in-context to observe and understand more deeply. While a 20-minute online survey with layers of advanced analytics may be useful to measure shopper behavior, the reality of this method, and many like it, is grounded in System 2 thinking. So many research methods measure the past and lean on shoppers to state and rate their path in a logical, rational and conscious way but we know that shoppers do not necessarily approach shopping in linear and rationalized way. Instead their in-the-moment actions and ideas occur in a System 1 manner – fast, automatic and emotional.

Much like KonMari advocates a selective choice of items that spark joy, we as researchers need to curate our approach and focus on fundamentals of real-time shopper observation and inquiry to get the needed depth of understanding, in the store and at-the-shelf (or in the moment of online shopping).

So, let's follow Marie Kondo's lead and find joy in letting go of that which no longer serves us well. Let's get back to basics and choose to declutter our approach to insights so we can propel retail out of the nostalgic past and into a brighter, tidier future.

Based in Seattle, Lisa Osborne is COO of Ignite 360 LLC, a San Francisco insights and strategy firm. She can be reached at lisa@ignite-360.com.

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••• pharmaceutical research

New targets need new solutions

Strategies for verifying physician respondents

| By Gennadiy Geyler

snapshot

Gennadiy Geyler outlines the need for verification processes in a changing medical market research landscape.

Over the past 15 years, the medical market research landscape has undergone dramatic changes. As the health care field has advanced and doctors have become more specialized, pharmaceutical companies have begun to seek survey respondents who are more specialized as well. A decade ago, a typical research project might target a list of 100 oncologists, broadly defined; today, projects may target 100 oncologists who specialize in a very specific condition, work with a very specific set of devices and are affiliated with a very specific subset of medical institutions at the forefront of their fields.

As pharmaceutical companies have become increasingly interested in targeting physicians who work in niche therapeutic areas at highly specialized facilities, clients' requirements for survey respondents have been shifting. For many years, medical market research companies have worked largely with lists of specific physicians whom their clients wish to target. However, more and more frequently, instead of just providing lists of doctors, clients are supplying lists of centers of excellence or other medical facilities and asking to target any doctors affiliated with these institutions. Conducting market research based on a list of institutions rather than just a list of specific individuals presents a unique set of challenges that the medical market research field has yet to fully address.

When presented with a list of targeted physicians, many medical market research companies take rigorous steps to verify that a given doctor is, in fact, who they say they are. Methods for doing so include a broad range of strategies, often aided by recent technological advancements. For example, robust automated processes can check the location of respondents' IP addresses against the state in which they claim to be located. Another effective means of verification is to use doctors' NPI numbers to manually check doctors' names and specialties against the information that is publicly available on the government CMS database.

Yet at present, there is no system in place to verify that survey respondents are actually affiliated with the hospitals or medical centers that they claim to be. There is a need to

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implement strategies that will ensure that survey respondents for these research projects actually align with the types of physicians whom clients wish to target.

For pharmaceutical companies, the lack of a robust verification system for doctors' places of work is a problem that can lead to costly marketing decisions based on erroneous data.

Closing the knowledge gap

Let's take a look at how this problem manifested for one client. For a certain project, a company wanted to target physicians who did not work at highly specialized cancer facilities. The client's intention was to survey 80 doctors who had experience treating patients with a specific condition but who were not specialists in this very specific, niche therapeutic area. The goal? To compare the data they had already compiled on specialists' knowledge with the newly collected data on non-specialists, in order to analyze differences between these two groups of doctors. This information, in turn, would help the pharmaceutical company to tailor its marketing campaign toward closing the knowledge gap between experts and non-experts.

It should have been a relatively easy task to identify 80 physicians who were not affiliated with any of the specialized cancer centers on the client's short list of facilities to exclude. After all, there are many more doctors nationwide who encounter patients with a given type of cancer than there are doctors who work at a handful of highly specialized facilities. Yet, when this research project went to field, nearly all survey respondents identified themselves as affiliated with one of the facilities on the client's "blacklist." As a result, the quota of doctors needed to complete the research project could not initially be reached.

So what happened here? Simply put, the survey as it had originally been designed included a screening question asking survey respondents if they were affiliated with one of the facilities on the client's blacklist. In order to qualify for the study, doctors needed to indicate that they were not affiliated. However, many doctors (whom we might term "professional survey respondents") are savvy enough to know that in most cases, marketing research companies are seeking to target specialists. Therefore, respondents will often falsely indicate that they are affiliated with a specialized facility in order to avoid being disqualified from the study.

This case study highlights an uncomfortable fact about studies that target doctors affiliated (or not affiliated) with specialized facilities. In the majority of cases, clients do wish to target specialists; yet as the study described above reveals, survey respondents are disproportionately identifying themselves as affiliated with the desired facilities, even when they are not. The result is that many seemingly successful research projects are in fact yielding erroneous completes and thus, inaccurate data. These data can, in turn, lead to expensive marketing mistakes for pharmaceutical companies.

Develop solutions

When it comes to verifying the medical facilities with which doctors are affiliated, medical market research companies will need to think outside the box and develop creative solutions. The following are just a few that can be very effective.

First, when designing any survey, it is critical to avoid asking leading screening questions whenever possible. This is not an earth-shattering proposition but it can require putting in some additional time and effort. If a survey asks doctors to choose the facility with which they are affiliated using a dropdown menu or checklist, it is posing one of the most leading questions that can be asked. The list immediately signals to doctors: "We are looking for survey respondents from one of these designated facilities; to qualify, all you have to do is select one of the options provided." A much more effective means of determining a doctor's actual affiliation would be to make the question open-ended. In other words, ask them to fill out a blank field with their place of work.

Of course, this strategy can lead to its own challenges. For example, there may be multiple ways of typing in the name of any given facility. Doctors affiliated with the University of Pennsylvania might indicate that they are from "UPenn," "Penn," "University of Pennsylvania" and so forth. Manually sifting through these responses in order to group doctors from the University of Pennsylvania together into one category can end up being arduous and time-consuming. Ideally, medical market research companies would take advantage of technology to simplify the process. They might employ a high-level programmer to create an automated solution that can decipher the multiple ways in which the same facility can be identified. Although this solution is not simple to put in place, it can be quite effective; and in the long run, it can save your research project from disaster. If the ultimate goal is to provide pharmaceutical companies with accurate data, asking doctors to manually enter the facility with which they are affiliated may be well worth the investment.

Another solution to the problem of physicians falsely identifying the medical facility with which they are affiliated is to keep the initial leading question but to manually verify responses on the back end. Again, this method requires an additional investment of time and effort but the payoff justifies the cost. Today, information about doctors' specialties and places of work is readily available on the Internet. Simply conducting a search for each doctor's name can be a simple and effective verification technique that may take only a few hours to complete. The end result is well worth the headache.

It is important to note that simply adding a disclaimer to a leading question, while easy to do, is not a reliable solution. It may seem reasonable to simply state upfront that physicians will not be paid if they misidentify their place of work and that their responses will be verified. Unfortunately, many survey respondents will either skip over "the fine print" or simply disbelieve the disclaimer when they do read it. After all, if they take surveys often, they will know that their responses have not been verified in the past.

Perhaps the most efficient solution that medical market research companies can employ is to create a very specific database of physicians, geared toward a specific research project. Various sources exist for determining which doctors are affiliated with which medical facilities. For example, hospital databases are publicly available and the doctors listed there can be identified by address, NPI number or another indicator. It is therefore possible for research companies to generate a project-dependent internal database of physicians affiliated with a given facility, which will ultimately simplify the verification process for survey responses.

Put a system in place

Just as it is critically important to verify the identities of survey respondents on client lists of targeted physicians, it is also imperative that medical market research companies put a system in place to verify that survey respondents have correctly identified the facility with which they are affiliated. If research companies fail to take these steps, they fail the pharmaceutical companies that rely on the data generated from their surveys.

Operating on faith about the veracity of physicians' survey responses is a surefire way to sabotage a research project. Pharmaceutical companies are counting on receiving accurate data to make important, often expensive marketing decisions. It is crucial for medical market research companies to implement creative solutions and streamlined verification processes that will empower pharmaceutical companies to make decisions with confidence.

Gennadiy Geyler is vice president of operations at MedSurvey, a Southampton, Pa., research firm. He can be reached at ggeyler@medsurvey.com.

••• shopper insights

We're in this together – sort of

Millennials are not parenting like their parents did

| By Allison O'Keefe Wright

snapshot

The author draws from her firm's research to offer a look at Millennial parenting trends – like separate togetherness, expert self-doubt and competitive co-parenting – and how they are impacting families.

Millennials are now the centerpiece of the new family dynamic. Nine in 10 new parents today are Millennials (ages 22-38) and so if your goal is to "talk to parents" – especially parents of younger children – you need to understand how to talk to Millennials. As data from Open Mind Strategy's Youth IQ syndicated insight tool (which surveys over 1,500 respondents between the ages of 13-37 twice a quarter) clearly conveys, Millennial parents are a cohort who is approaching parenting with a new lens, making new rules, taking on new roles and not necessarily following in the footsteps of the parents who came before them.

They want to carve their own parenting path and showcase their unique family experiences (and parental expertise) for all the world to see but deep down they are questioning themselves every step of the way. Our firm has the honor to consistently study these new, often stressed, always striving parents, both quantitatively and qualitatively and we've uncovered some major shifts, powerful dichotomies and significant unmet opportunity to better serve and connect with this critical cohort.

Often the boss

There once was a time when parents were the boss but when Millennials were kids that was no longer the dynamic – Millennials were often the boss of their parents. Those in the "baby on board" generation were their parents' rising suns and the CTOs of their families. But what happens when the "boss child" becomes the parent? They want to give their kids the same respect that they were given but certainly don't want to relinquish control or give up their own personal pursuits and passions to only fulfill their child's. The result? The new family dynamic: We're in this thing together.

Millennial parents have a different concept of "me time." Eighty-six percent say they spend the majority of their free time with their kids but most still want to pursue their own passions, which means "family time" has taken on new meaning. Sixty percent of Millennial parents say that when thinking about things to do with their kids, they DO NOT only think

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about kid-specific activities. In fact, 40 percent of Millennial dads even say, "I have no problem with people bringing kids to bars." Millennial parents want regular access to new, interesting experiences to fulfill them personally but they're bringing their kids along for the ride.

But does this constant togetherness equate to quality time? One needs only to walk into the closest restaurant and observe a young family of four dining together, each on their own devices, sitting silently, to get the answer to that question. "Separate togetherness" is a rampant phenomenon and a social dynamic growing more acceptable from playgrounds to Silicon Valley corporations. Still, though Millennials themselves have led the charge on this social dynamic, that doesn't mean they feel good about it for their kids.

Millennial parents are not happy about this "separate togetherness" when it comes to the family dynamic, making the original digital natives increasingly anti-digital parents. They are seriously concerned about the dangers of digital disconnection and as a result, are increasingly viewing TV as the "good screen." TV has long been the screen that everybody loves to hate when it comes to evaluating the well-being of children but for parents who are über-concerned with the isolation of digital, TV is celebrated for its "safer content" and ability to act as a centerpiece of connection.

When we put a group of Millennial moms and Gen X moms into a conflict focus group setting – first interviewing them separately and then bringing them together – Gen X moms initially assume that Millennial moms just let their kids "get up to no good" online because Millennials have always been so digitally driven themselves. But in deeper conversation we find the Gen X moms are actually much more lenient. They are more afraid that if they keep their kids off of certain apps and platforms, their kids will be out of touch – they'll have no friends. Millennial moms, on the other hand, have no concerns about giving digital a "hard no" or at least some very strict limits.

Millennials know all too well the dangers of digital peer-pressure and digital addiction: 62 percent of Millennial parents report being "very worried about the time my child spends on their own device," while 63 percent would "rather my kid watch TV than be online."

This is a big parenting shift psychologically, which again is ironic as Millennials have often been credited with the demise of linear television. The cord-cutting generation is very pro-TV screen when it comes to their children. This opens the door to real opportunity for content producers, because while these parents are pro-television, they also have significant unmet needs when it comes to TV content that connects families. Three-in-four Millennial parents say that when watching TV with their kids, they usually watch kids shows that they don't particularly enjoy. Everything is now so tailored to specific audiences that "family TV" rarely lives up to the standards of the whole family. This means significant unmet opportunity around truly connective content, especially for this new generation of parents who prefer to blur the lines on "me time" and "we time."

Expert crowdsourcers

Another way that Millennial parents have shifted the familial and parental dynamic is in their approach to figuring it all out. While previous generations of parents often turned to their own mom and dad for advice on the many trials of parenting, these young parents – though very close with mom and dad – acknowledge that they are raising kids in a completely different world than their parents raised them. As such, these expert crowdsourcers head online to find the answers to life's many questions – and often spout their own expertise or POV while they are at it.

Google is often the gateway to countless opinions and recommendations related to raising kids but even more than the sources they find in their top Google results, Millennials are increasingly drawn to the more customized, tailor-made information they can find from like-minded peers in their social stream. Forty-three percent of Millennial parents regularly seek out advice from peers in their social networks and more and more they are relying on, even preferring, the information they can glean from the parenting-related Facebook groups to which they belong than information from more general parenting sources or experts online. Likewise, Millennial parents are sharing their expertise and perspective in the social realm – Millennial parents strive to live a life designed to display and significantly over-index on most every daily social sharing behavior (from posting pics to updating statuses to sharing photos and more) when compared to childless Millennial peers.

However, though Millennial parents are often "overactive" when it comes to sharing their opinion, there is also a significant downside to the having 24/7 access to so many perspectives and so many digital displays of "perfect" parenting. An ongoing influx of outside opinion makes you question your own decisions … constantly. Forty-four percent of Millennial parents admit that they are overwhelmed with the amount of parenting information available to them. From groups telling you to choose breast over bottle to images of idyllic children's birthday parties or the perfect packed lunch in your Insta feed, Millennial parents are stressed, overwhelmed and worried that they can't keep up.

More than six-in-10 Millennial parents admit, "I am constantly stressed out and looking for relief." More and more they are appreciating people, organizations and brands that celebrate the beauty in the flaws of reality. It is important to know that while these new parents demand and depend on super-customized, personally relevant information, they are also craving imagery and messages that keep it real and supportive – that act as the antidote to the overwhelming information, unachievable perfection and self-doubt.

Dads are more active

And when it comes to "being supportive," Millennials are a generation of parents who are co-parenting more than any generation before them. Millennials dads are significantly more active and engaged in childcare than dads of previous generations but they aren't just doing more of the lifting at home: 78 percent of Millennial dads also say that they play the role of "the fun parent," making Millennial dads more than 40 percent more likely to say this than Millennial moms.

Enter one of the major strains at the center of the new family dynamic: the competition between the "fun parent" vs the "default parent." Though mom is often working, she is still significantly more likely than dad to say she attends to many of the "technical requirements" of parenting. Millennial moms are 69 percent more likely to stay home when the child is sick, 53 percent more likely to coordinate the child care and 42 percent more likely to be the parent the school calls in case of an issue. Still, dad is more involved than dads of any previous generation and so he is constantly being praised for being an "amazing parent" – irritating mom, who feels like dad gets medals from his mom, from her mom, from society, when he executes the same parental duties that she is just expected to handle.

The "default role" and the lack of praise that comes with it is a major source of anger and frustration for Millennial moms. They too want to be the fun parent – not just the task master – and while they appreciate dad, they'd like equal praise as well. Dad, on the other hand, is proud of both his "fun parent" status and his excellent parenting skills and he's frustrated because much of the media he sees paints dad as an idiot and mom as a genius. Two in three Millennial dads think the dad characters in their kids' shows come across as idiots, while the same number think that the mom characters come across as smart.

Diving into this strained dynamic requires both sensitive qualitative conversation and a detailed quantitative analysis of perceived responsibility level and actual duty execution in the home (hint: moms' and dads' responses TOTALLY contradict one another). But across both qualitative and quantitative analysis, a clear message emerges: Today's parents are both cooperating and seriously competing at home and they need solutions to help them come together. Dad responds to brands and messages that reflect a dad who is "on it" like he is while also celebrating the fun side of parenting which he loves. Mom is deeply appreciative of messages that acknowledge the stress she is under (especially humorous messages) and that celebrate her tenacity. But she also wants in on the "fun side" – she wants opportunities to take the helm as fun parent more often and to find a truer balance with dad. She loves brands that "really see" her, that give her tools to express and to manage but also that help her live it up and disconnect.

How to talk to Millennial moms and dads

When targeting Millennial parents, remember some of the key shifts at the center of the new dynamic.

- They are less inclined to separate "me time" and "we time" and believe in an "in this thing together" mentality but they are often held back by the separate togetherness of a digital world. They yearn for new connective moments – both in family activities and media.
- They are expert crowdsourcers and über-sharers who crave tailored, customized information, value the perspective of likeminded peers and regularly share their own POV but they are also overwhelmed by this never-ending influx of info and the pressures of living a life designed to display.
- They appreciate real and supportive messaging that acknowledges that perfection is unachievable, soothing their self-doubt.
- They are co-parenting more than any generation before and striving for balance in their shared responsibilities but mom is frustrated that she is often stuck in the default role while dad takes the helm on fun and dad is annoyed that media often still features a bumbling guy who doesn't have it together the way he does.
- They need resources to help them better manage the modern work/life dynamic and they each appreciate brands that "really see" them, better reflect their realities and help them explore their passions, while junior comes along for the ride.

Use research to stay on the pulse

As the Millennial parent cohort continues to grow in size and impact, it is increasingly critical to use both qualitative and quantitative research methods to stay on the pulse of the evolving attitudes, behaviors and unmet needs of these individuals at the center of new family. Not only are their actions and decisions relevant to brands seeking to connect and thrive within the modern household, their approaches to parenting are shaping the beliefs and values of the next generation of people. Just as their childhood roles as CTO, friend and often boss to their helicopter parents shaped them – leading to today's "in this together" family dynamic, among other things – the roles that their children play in their family will be fundamental in shaping their future values. What will the evolution of "me time" to "we time," stricter household rules to prevent digital dangers, a childhood publicized stage by stage on social media and a lifetime with parents who cooperate more – but also compete more – mean for the next generation of consumers and their take on the world? We can start finding out by closely examining the new family dynamic.

Allison O'Keefe Wright is EVP, managing director of research and strategy at New York-based research firm Open Mind Strategy. She can be reached at allison@openmindstrategy.com.

••• shopper insights

Marking milestones and making memories

Unlocking the key emotions at play in the back-to-school shopping experience

| By Jim Tincher

snapshot

Journey-mapping showed Avery there's more to school-supply shopping than checking items off a list.

It's no secret that the e-commerce share of total retail sales grows larger every year. It currently hovers around the 10 percent mark on its inexorable, upward trajectory.[1] Brands that established their distribution channels long before the digital age ignore Amazon and other e-tailers at their peril. As H.G. Wells put it: Adapt or perish.

But doom-and-gloom predictions for brick-and-mortar stores also miss the mark. For one thing, that 10 percent figure conceals a wide disparity across sectors and products. In the U.S., you can still count on one hand the percentage of groceries sold online, while the figure for books and music is around 50 percent.[2] The skewed picture this paints of the retail landscape makes it all too easy for companies to be led astray and waste already limited marketing resources tilting at windmills to recapture lost market share through often misunderstood – and sometimes overestimated – digital channels. The in-person shopping experience is not on its deathbed just yet.

In fact, the key role emotions play in purchasing decisions can work in favor of in-person experiences, as Avery Products Corp. recently discovered when a division of the company decided to map the back-to-school supplies shopping journey.

Over the past 75-plus years, Avery, one of the world's leading manufacturers of home, work and school supplies, has built a reputation for quality and durability. The company's school supplies product line includes binders, dividers, tabs, sheet protectors, folders, markers, highlighters and glue sticks. Sales in Avery's school supplies products surge every year in the third quarter, as families make their back-to-school purchases.

Avery school supplies are sold through online channels – including, of course, Amazon – as well as big-box and specialty stores. But the company was feeling the three-pronged impact of technological advances that have changed or reduced the use of its traditional product lines, declining store sales and increasing pressure from low-quality, low-priced private-label brands – such as Target's Up&Up products – which hog

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premium shelf space and woo price-conscious consumers. The number of U.S. households with school-age children has been decreasing in recent years, which only exacerbates the situation.[3]

There's still a robust market for Avery products; the firm just needed to discover new and better ways to engage with consumers. In recent years, it's even made significant inroads with Amazon, through a partnership with influencer and designer Amy Tangerine on a fashion collection of products targeted at teenage girls. Avery focused on increasing its online presence to offset the decline in retail store sales and the products have proven to be wildly popular. But it needed to do more.

Require a better understanding

The company recognized that responding to these new market challenges would require a better understanding of how consumers make decisions about back-to-school supplies, finding out whether parents' decision-making varied significantly by the age of their children, determining how consumers feel about branded vs. store products and identifying the best ways and times to communicate with parents to influence their decisions more effectively.

That's where journey-mapping came in.

Since emotions drive buying habits, it's more important than ever to determine what consumers are thinking and feeling during the shopping journey, in order to identify the trouble spots in the journey that are causing buyers friction and the moments of truth that have a disproportionate impact how positively or negatively they view the journey overall. That's why journey-mapping has become a foundation of many effective customer experience programs. When done properly, it unlocks the knowledge essential to developing an effective strategy for improving the customer experience and boosting brand loyalty. So Avery set about harnessing the power of this valuable tool.

"I'm sure a lot of other brands will relate, as we see more online space pressure, Amazon taking over and pushing down prices," says Consumer Insights Manager Melody Miyaji, a core member of the Avery mapping team for the project. "Journey-mapping is a big up-front investment but it needs to be done, because in the long run, you have to be very strategic and careful spending what you have."

Five essential questions

Avery contracted with Heart of the Customer, my journey-mapping consulting firm, to shepherd them through the process. Our team started with the three most important factors in successful journey-mapping: involving a broad, cross-functional team; embedding the voice of the customer in decision making by involving consumers in the process; and selecting the right journey.

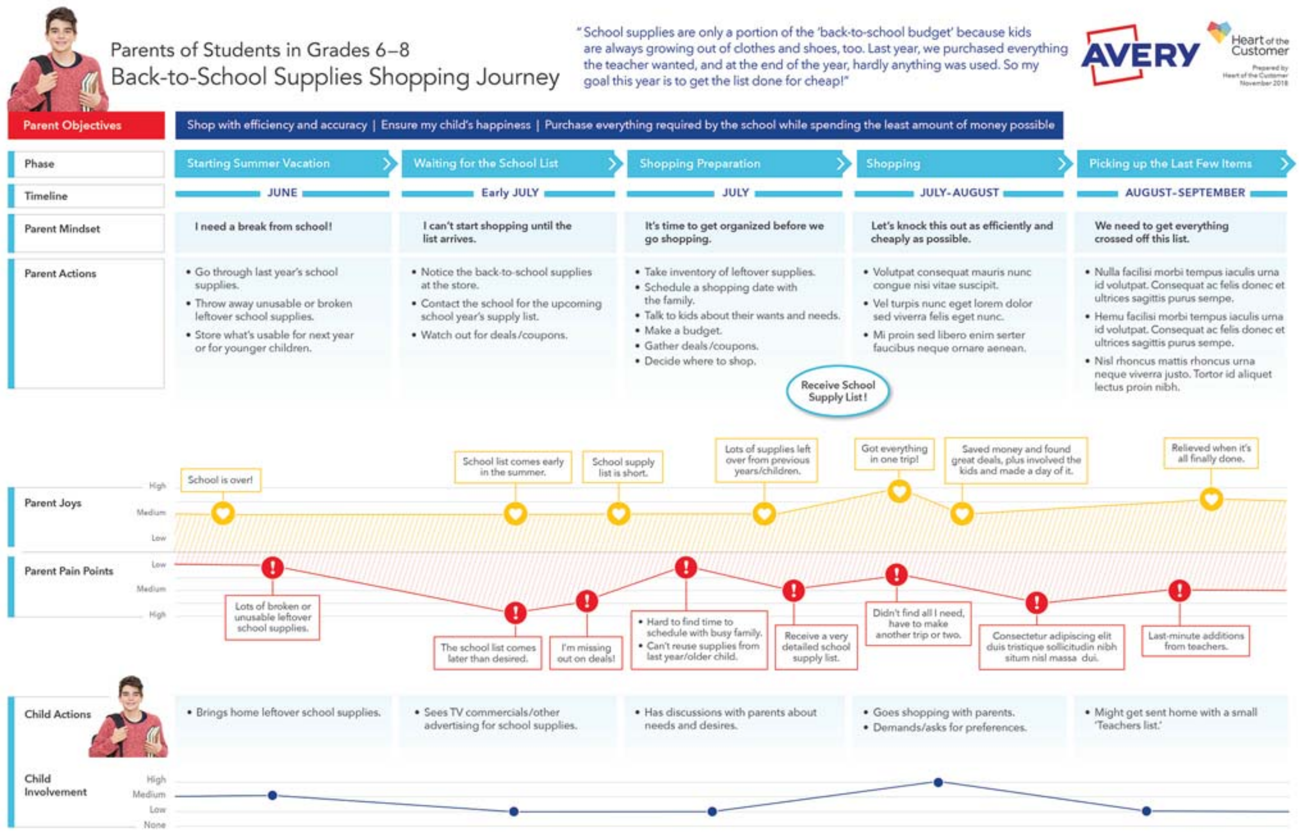
To ensure best practices were followed, we began by asking five essential questions:

1. What is the business problem or opportunity mapping is meant to address?
2. What's the right journey to map?
3. Who's the right customer to map?
4. What's the right approach and methodology to use?
5. Who's on the right team?

"Going through the process was key. It's critical for anyone thinking about journey-mapping," Miyaji says.

The first steps in journey-mapping accomplish more than just information-gathering. They are designed to generate buy-in and excitement in order to engage employees and, most importantly, to align the key stakeholders within the company who can take ownership and eventually green-light the programs that will transform the company's decision-making to make it more customer focused.

The project kicked off in May 2018, in order to be ready for the back-to-school shopping season, which was thought to begin in June. (More on that in a moment.) We met with key stakeholders for a hypothesis-mapping workshop to review ideas in order to frame the approach and determine the best methodology for engaging parents across the entire journey, which lasts



Figures 1 and 2: Examples of the journey-map output that helped Avery better understand the back-to-school shopping experience. (Note: Latinate text is used to mask instances of proprietary findings.)

into the beginning of the new school year in September.

Avery was thrilled with the outcome of that effort. It ended up with a framework from the workshop that allowed it to fill in the gaps and validate assumptions through surveys. "The design was genius," Miyaji says, "an out-of-box approach that really worked." It combined digital ethnography that followed parents while they shopped with surveys that targeted specific parts of the journey. Using both qualitative and quantitative research resulted in a rich representation of the voice of the customer.

Data was gathered through forums, quick polls, diary studies, journals, scrapbooks and surveys, with more than 350 participants contributing to the community. This longitudinal approach allowed Avery to see how parents' mind-sets, attitudes and motivations changed over the course of the journey. "Following consumers over time was different than what we'd done in the past," Miyaji says. "A typical face-to-face interview is on one day but following shoppers over months? That was really interesting and unique.

"There were trade-offs between talking with someone in their home once and following people over time," Miyaji says. "In place of deep but narrow perceptions, we were able to look at how people rated different features over time and how the importance of those features changed." For example, when asked in June, while planning their shopping, parents rated brand as most important; convenience came in a distant fourth. (Involving the children and in-store pricing were between the two.) Fast-forward to September, with the new school year already in full swing and the importance of those features flipped. Stressed and anxious parents eager to find the remaining items on their lists weren't picky, they just wanted to be done.

"It was disappointing for us to see but they were scrambling," Miyaji says. "It was enlightening to see the impact of external factors and the emotional feelings that came out. But that's what's great about journey-mapping – it allowed us to look at that shift and their purchasing experience over time."

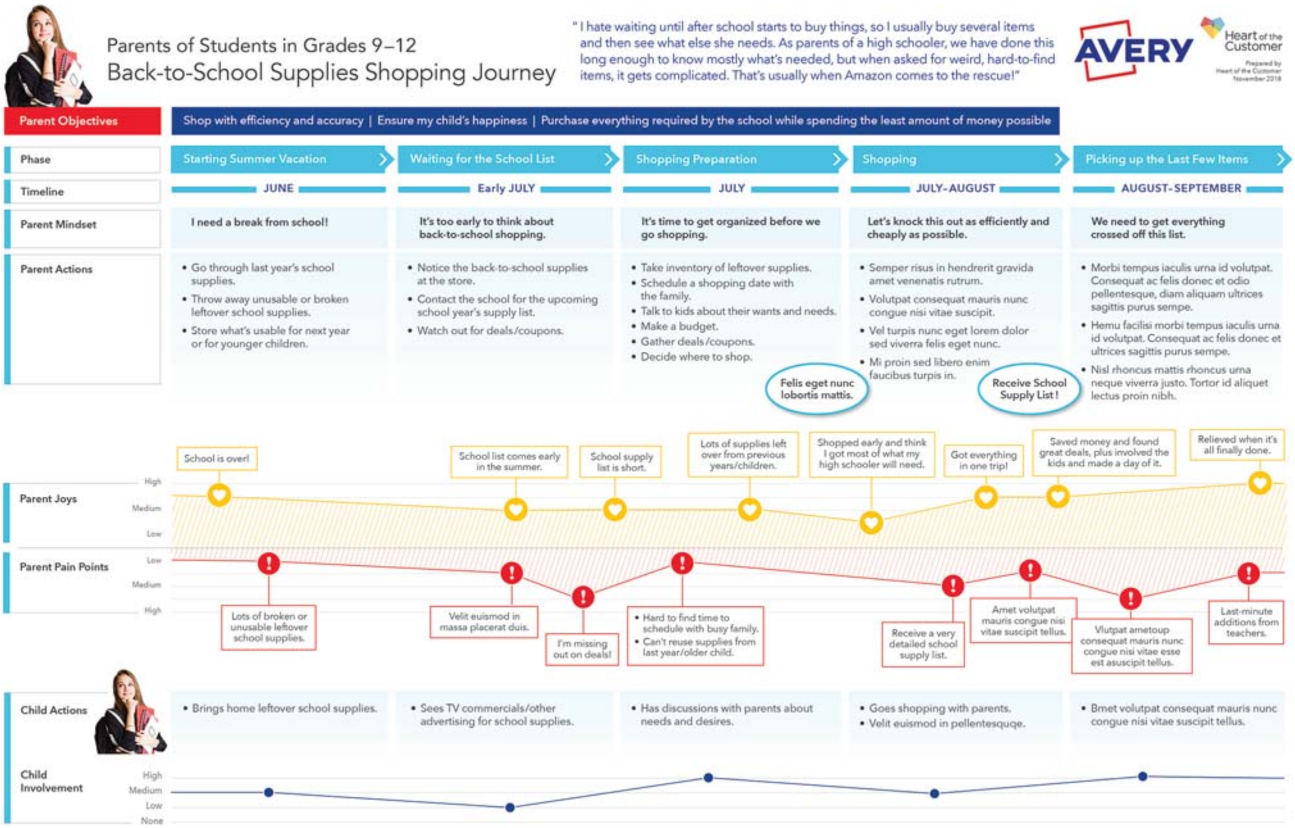
The process of identifying personas was a little unusual. Typically, participants would be sorted based on their behaviors or other experiential attributes. But in this case, the segments were determined based on the age of the subjects' children. It was important to Avery to determine whether parents' buying decisions varied based on the grades their kids were entering, especially since high school students make decisions primarily on their own.

Ultimately, journey maps were created for three personas, representing parents of elementary-aged children, middle schoolers and high schoolers.

Misjudge a business problem

Overall, the insights revealed by the mapping process did not surprise the team. However, they did show how initial internal hypotheses can misjudge a business problem, giving more weight to a perceived issue than it merits and missing other opportunities entirely. That's why involving actual consumers is so important in journey-mapping.

First and foremost, Avery discovered that the shopping journey didn't begin organically each June after a brief break at the end of the school year. The trigger for the journey was the schools' release of their supply lists, which typically didn't occur until early to mid-July. These grade-specific lists are the real drivers



of the journey at every level, spurring parents of children in all of the segments into action. "That was a big aha moment for us," Miyaji says. "Because we knew the lists were important but didn't realize how they dominate everything."

The second key finding was that, despite the expense and hassle of shopping for back-to-school supplies, parents in the younger age segments genuinely valued the bonding "quality time" it entailed. Parents enjoyed "making a day of it," stopping for lunch or ice cream, indulging kids by allowing them to select a special item and spending time together sharing an activity.

Essentially, what we found was that traditional retail still matters. And the emotional connection with that type of activity probably applies to other areas in back-to-school shopping as well.

As the two discoveries above demonstrate, Avery also found, to its relief, that there weren't any game-changing differences between the consumer segments.

Address the insights

With the research and mapping completed, we launched into the third phase of our journey-mapping protocol, leading the cross-functional Avery team through an action-planning workshop designed to develop both short- and long-term programs to address the insights gleaned from the journey maps. The workshop is designed to generate dozens of ideas, sorted into two types, with teams voting on those they believe should move forward and be further developed. "Strategic ideas" focus on long-view direction, while "quick wins" provide instant gratification, boosting enthusiasm and engagement within the team with actions that have an immediate impact. "Since not all of the ideas generated are going to take a ton of resources, we're armed with ideas we can implement right away," Miyaji says.

Our three-phase mapping process – discovery, customer immersion and action – allowed Avery to focus its efforts on realizing the greatest return on its investment for multiple business outcomes and ensures that the voice of Avery's consumers will be embedded in decision-making going forward.

Having a core team was critical to the success of the project. The core Avery team included Miyaji, Senior Product Manager Sheila Vega and the project sponsor Marketing Director Laura Cruz. A broader cross-functional team, spanning multiple departments, was also involved every step of the way. "There was a time commitment, but it was spread over months," Miyaji says, "including just making sure people were aware of the project and kept it top-of-mind and getting leadership on board supporting the research. When it came time for the action-planning workshop, the hypothesis-mapping workshop was still fresh in people's minds even though it had taken place months before.

"Avery wants to do journey-mapping for all of our business categories now and the success of this experience moves that along," Miyaji says. "And it's given other teams confidence. People are saying, 'I want to do this!' and 'How can I do that?' And now with our experience with the process, we can advise them on administering the project."

Jim Tincher is founder and mapper-in-chief at Heart of the Customer, a Minneapolis research firm. He can be reached at jim@heartofthecustomer.com.

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Voices from the margins

A qualitative dive into Mexico's LGBTQ communities

| By David R. Morse, Susanna Fránek and Gerardo Gallart

snapshot

Researchers found the intimacy of qualitative methods helped them establish valuable trust as they interviewed LGBTQ respondents in Mexico.

www.quirks.com/articles/2019/20190608.aspx

In recent years, Mexico has been decidedly progressive in its efforts to combat discrimination and hate crimes on the basis of sexual orientation and gender identity. A recent study by political scientist Caroline Beer concludes that Mexico is more progressive than the U.S. when it comes to LGBT rights, especially in the recognition of same-sex relationships. For instance, in 2003 the Mexican Chamber of Deputies unanimously passed a national anti-discrimination law that included sexual orientation as a protected category and developed a national anti-homophobia campaign. In 2010, Mexico City passed a law allowing same-sex marriage; five years later, the Mexican Supreme Court released a "jurisprudential thesis" in which the legal definition of marriage was changed to encompass same-sex couples. While this ruling did not directly strike down Mexico's same-sex marriage bans, it ordered every judge in the country to rule in favor of same-sex couples seeking marriage. Currently, Mexico City and 14 of the 31 states legally perform same-sex marriages.

On the other hand, progressive legislation aside, many would argue that Mexico has a long way to go in terms of full acceptance of sexual and gender diversity. As is the case in many Latin American countries, Mexico has traditionally been the realm of machismo and homophobia and many argue that this is still the case. Cries of *puto*, a derogatory term for a gay male, have gained notoriety in recent years for becoming commonplace at Mexican soccer games. A study by the Center for International Human Rights of Northwestern University School of Law states that "homophobia and transphobia remain prevalent in Mexico and discrimination and hate crimes on the basis of sexual orientation and gender identity remain all too common."

In order to gain deeper insight into these contradictory narratives and offer a path to marketers pondering an LGBTQ strategy, Ethnologix, La Fábrica de BTL and New American Dimensions partnered to conduct qualitative research in Mexico with members of the LGBTTTI community

– the Mexican term for lesbian, gay, bisexual, transvestites, transgender, transsexual and intersexual individuals – as well as non-community members. A particular focus of our study was with trend leaders, people who think differently and who live on the periphery of mainstream culture. This approach allowed for a nuanced understanding of the intersection of gender, race, culture, history and socioeconomics, giving us a glimpse into their behaviors as consumers and participants in society, as well as giving a voice to their humanity.

The study was conducted in phases throughout 2018, across eight cities in Mexico. Ages ranged from 15 to 35. Socioeconomic levels (NSE) were segmented between low (D+, C-), middle (C, C+) and upper-middle (B) respondents. Interviews took place in homes and different meeting places in the community to ascertain distinct societal perspectives. Qualitative methodologies included:

- 24 focus groups with a mix of LGBTTTI community and non-community members;
- nine eight-hour ethnographies with artists, activists, psychologists, etc.;
- 10 on-site interviews with key segment members (drag queens, artists, actors, queer feminists, etc.); and
- four ethnographies in Mexico City with queer "artivist" subgroups: poets, animators, fashion designers, etc.

Among our findings were the following observations:

Many emphasized that the LGBTTTI categories should not be taken as being definitive but rather evolving and fluid. Indeed, redefined sexual identities challenge traditional heteronormative gender roles and respondents fully embrace gender differences and cultural diversity and confront what has traditionally been a misogynistic and classist culture with rigor.

The younger generation, in particular, perceives sexual and gender classifications as still in progress, not absolute; they are in the midst of negotiating new boundaries of their identity outside traditional, mainstream classifications. Common themes with younger LGBTTTI participants included: gender fluidity; confronting the traditional machista/classist culture; challenging beauty standards; and becoming the role models they never had. For many younger respondents, YouTubers often go beyond being a source of inspiration, helping with the construction of a new sense of self. The youngest discover models and points of reference from these platforms that not only provide examples and fantasies but also help with the construction of one's own unique identity as they crack the code on "me doing me."

Most felt strongly that acceptance of LGBTTTI rights has grown tremendously over the past 20 years, though at different speeds throughout Mexico. There was a strong consensus that Mexico City is leading advancements in legislation, though the church and conservative entities fight aggressively to block progress and promote conversion therapies. Despite progress, rejection, judgment and discrimination within the LGBTTTI community persist. Differences exist between generations and gender creating the need for more bridge building to create a stronger unifying force.

Despite advances in Mexico City, respondents in cities including Chihuahua, Torreón, Mérida, Tijuana and Guadalajara were quick to point out that change has been relatively slow. Many expressed that outside of the capital, one encounters the same judgements, prejudices and marginalization as before; in other words, the same laws of exclusion, homophobia and heteropatriarchy still apply.

Influence a paradigm shift

All are heavily influenced by a globalized, homogenizing LGBTQ culture due to the proliferation of media, popular culture, film, popular music, the Internet and technology. Additionally, as public personalities come out of the closet in greater numbers, they influence a paradigm shift in Mexico and family, sexuality and adoption are themes that take on new meaning. Similar to how programs like *Will and Grace* in the U.S. helped make mainstream America more comfortable with gays, the Netflix series *La Casa de Las Flores* deals with bisexuality, gay marriage and transgender topics as a traditional Mexican family adjusts to a new world.

Socioeconomic level has a large effect on attitudes and possibilities. For those with more socioeconomic resources, there are greater social pressures in terms of behavior (the need to fulfill heteronormative expectations); greater possibilities for professional development; access to exclusive places that provide security and recognition; and, in the case of transsexual people, the possibility of access to treatments and surgery of the highest quality. For those with fewer resources, there are higher incidences of violence and aggression; socially determined professions (hairdressers, cooks, police); the stereotype of violent domestic relations; limited access to health services; and in some cases, working in the sex industry might be the only means of subsistence.

Has repercussions

Not all groups have the same visibility, either inside or outside of the LGBTTTI community. The level of visibility has repercussions on the level of inclusion and acceptance. It's common that the less visible groups suffer greater social exclusion and unique problems, resulting in them having different coping strategies than those with higher visibility.

Those engaged in activism and the arts brave the edges of Mexico's paradoxical nature, embracing the duality and relishing the cultural richness that serves as inspiration for their creative, personal and lifestyle endeavors. They strive for a more open, inclusive world that debunks the confines of prior generations that often limits their possibilities. Yet, respecting elders is very much intact; family continues to be a valued, stabilizing force in their lives.

Many expressed that they are activists, demanding equal rights and fighting against discrimination and violence. A common theme is the myth that the United States is more progressive on LGBTTTI rights than Mexico.

Still, most were quick to point out the myriad challenges facing LGBTTTI individuals, both within and outside of the community. For example, outside of the community, trans people, especially women, constantly experience discrimination, very often a function of their physical appearance. Many expressed that heteronormality is often the center axle and any other manifestation is considered a perversion; in many cases, members of the community find themselves the subject of jokes, insults and bullying. Additionally, many discussed homonormativity, the reinforcing of gender hierarchies and intolerance that can frequently manifest among the community's own members. Misogyny, transphobia and internalized machismo were commonly mentioned.

There appear to be two doors for coming out of the closet, one that is self-initiated, the other imposed. When self-initiated, coming out often takes place first within the family and there is often a female figure who supports and acts as an intermediary (grandmother, aunt, mother, etc.). Many who fall into this category are able to leverage the support of family and community toward greater self-expression. Conversely, when coming out is imposed, the experience is often one of getting "busted," often after one has constructed a chain of lies that ends up with the family finding out. The consequences might be one of negation, psychological therapy and religious corrective measures, including being taken to a priest. Still, for so many respondents, coming out of the closet generated positive emotions of acceptance, pride and becoming whole. For others not being "too out," i.e., staying closer to heteronormativity, helps gain more social acceptance and maintain a sense of balance with their families.

Different identities within the community tend to group themselves by subgroups or tribes. Some tribes are based on gender expression or social and artistic interests. Others are structured around physical characteristics of their members. Still, it is important to point out that not all the members of a segment self-identify with a tribe or subgroup. Many keep themselves apart by constructing their own identity with personal characteristics, not those of the group.

Engaged in cultural production, queer "artivists" use their art as a tool for possibilities of resistance. Through experimentation their art takes on an activist role, i.e., use of non-conformist performativity, public display, fashion, poetry readings and social media. They are disrupting the space of gender identity by calling out oppressive traditions and debunking hyper-masculinity. They reflect new experiments in culture. Storytelling is an intentional construct that fuses personal and collective experience through the arts and the environment, finding inspiration through music, poetry, literature, ideas around sustainability and re-appropriating space for creative performance that encourages collaborative communities.

As is the case in many countries around the world, clubs and bars play a unique role in the gay community. Clubs can be either mixed (hetero and LGBTTTI) or directed toward specific LGBTTTI tribes. These establishments engender a sense of belonging, group recognition and, to some extent, privacy and a sense of complicity. In addition to tribes, clubs are often segmented by price (high-end versus low end) and type (pre-bar, dancing, shows, private, etc.).

Genuinely support the community

In terms of marketing, many respondents make a clear distinction between companies that genuinely support the community and those that do the "pink wash," in other words, talking the talk without making a real statement.

Suggestions for companies included the need to define and express a concrete position in support of this community; incorporating talent, recognizing diversity and inclusion in practice; developing employees with education; supporting inclusive organizations; looking for advocates and opinion leaders within the segment who can represent a brand and be its mouthpiece; communicating values of acceptance and realization; and supporting social causes.

Conversely, respondents warned companies against pink-washing; perpetuating obstacles within the organization that limit expressions of sexual and gender identity; and transmitting binary stereotypes or ideas of gender and sexuality that are static and not evolving. Many emphasized that taking a stand once a year, during Pride, is not enough.

Extract nuanced learnings

In the final analysis, this methodology enabled us to delve very deeply into Mexico's LGBTTTI community and to extract nuanced – indeed, intimate – learnings. Like the extant research, we found Mexico to be a study of contradictions, in many ways driven by region, age and socioeconomic status. While younger respondents in Mexico City, of greater socioeconomic means, for example, encountered a burgeoning LGBTTTI community, those outside of the capital, older and of lesser means, described a much more repressed, indeed homophobic and transphobic environment.

One interesting learning was that the methodology allowed us to garner a great degree of trust with respondents. Many felt themselves to be active collaborators in the research project and saw themselves as being voices of the larger LGBTTTI community. Many participants seem to feel that it was important that the interviewers "get it right" and represent their community in an unbiased, positive manner. While we do acknowledge that such a degree of intimacy has the danger of lending itself toward bias, the relationship enabled us to venture far more deeply and into very personal territory, which would never have been achieved with more traditional methods.

David R. Morse is CEO and president of New American Dimensions, a Los Angeles research firm. He can be reached at david@newamericandimensions.com. Susanna Fránek is a cultural anthropologist with research firm Ethnologix. She can be reached at susanna_franek@ethnologix.com. Gerardo Gallart is CEO of marketing services firm La Fábrica de BTL. He can be reached at ggallart@fabricadebtl.com.mx.

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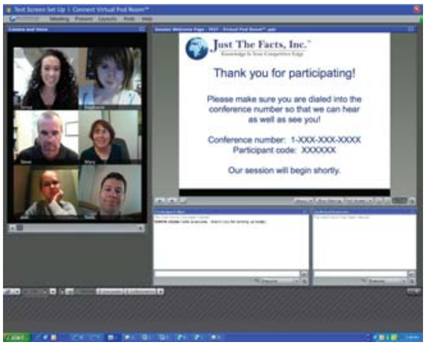

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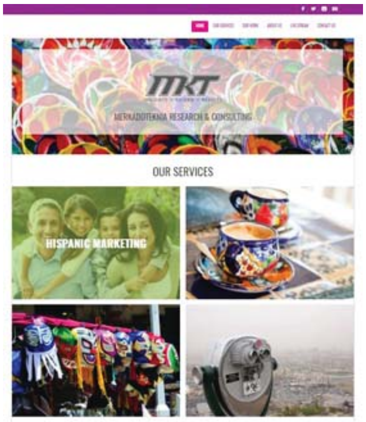

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Carly Fink, Principal, Head of Stategy and Research

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Names of Note

■ Insight consultancy *Basis* has named **Soumya Roy** as CEO of Basis NY.

■ U.K.-based consumer insight agency *Join the Dots* announced that **Karen Schofield** has stepped down as managing director of Join the Dots Singapore to pursue other interests. **Maria Spinelli**, who recently left her post as managing director of *System 1 APAC*, joins the company's Singapore office as head of Asia.

■ *Burke, Inc.*, Cincinnati, has promoted **Mechele Lee** and **Gabriela Pashturro** to vice president, senior account executive in client services. In addition, the firm has promoted **Diane Surette** to president and CEO, effective Oct. 1. Current CEO **Jeff Miller** is retiring but will continue to serve on the company's board of directors and act as a consultant to the company.

■ **Diana Bailey** has joined Emeryville, Calif., strategy and research consultancy *Greenberg Strategy* as vice president of strategic planning.

■ **Joseph Jordan** has been named senior vice president of supply at Deerfield, Ill.-based research firm *Curion*.

■ Rotterdam, Netherlands-based consumer insights company *MetrixLab* has appointed **Pieter van der Gouwe** as managing director of MetrixLab Netherlands. Additionally, **Pim van Leeuwen** has been promoted to director of client strategy and growth. They will jointly lead the company's Dutch office.

www.quirks.comarticles/2019/20190614.aspx

■ Audience technology platform *Eyeota* has appointed two new executives to its senior leadership team: **Chris Suh** as senior vice president of corporate development and strategy and **Don Lee** as vice president of global platforms.


Major

■ **Brian Major** has joined Cincinnati-based firm *Directions Research* as vice president, client service.

■ **Jodi Schwartz** has joined East Rutherford, N.J., company *Russell Research* as vice president of strategic planning.

■ Columbia, Md., marketing agency *Merkle* has appointed **Peter Randazzo** as global chief technology officer.


Saks

■ Stockholm-based technology provider *Cint* has appointed **Lottie Saks** as CFO.

■ China-based e-commerce company *JD.com Inc.* has appointed **Chen Zhang** to a new role as a senior advisor based in the United States, leaving his role as chief technology officer.

■ Toronto-based data services firm *Maru/Blue* has announced multiple promotions: **Katie Gawlik** to VP of strategy and development on the agency sales team; **Waleed Nesyif** to VP of strategy and development on the enterprise sales team; **Mellissa Hill** to VP of strategy and development on the market research sales team; and **Amanda Naismith** to VP of profiling and analytics on the community management team.

■ Plano, Texas, data services company *Dynata* has added data strategy as an area of focus, expanding the scope of its existing research science group. **Melanie Courtright**, currently EVP of global research science, will continue to lead the group in an expanded role as EVP, research science and data strategy.


Hendrickx

■ Rochester, N.Y.-based research operations company *Owl Solutions* has hired **Michelle Hendrickx** as director of operations.

■ Two executive members of Jersey City, N.J., mobile data technology company *SITO Mobile* have been appointed to the *Mobile Marketing Association* (MMA) board of directors. SITO CEO **Tom Pallack** will serve on the MMA's global board and **Bruce Rogers**, founding managing director of The SITO Institute for Consumer Behavior and Location Sciences, will serve on its North American board. Each have committed to serve a two-year term.

■ Deerfield, Ill.-based research firm *Curion* has appointed **Sean Bisceglia** as chief executive officer.

■ **Emily Carroll** has joined Syracuse, N.Y., company *Drive Research* as marketing coordinator. In her role, Carroll will assist the team with content marketing, social media and digital marketing analytics.

■ U.K.-based software company *Digital Taxonomy* has announced multiple changes within the company. **George Hamza** has joined the company to help clients with support requests as well as testing and adding new features to Codeit. He also supports the company's product road map. Additionally, Digital Taxonomy has brought on a summer AI intern through CAP-AI, funded by the European Regional Development Fund. The intern will work on a project to further enhance the company's machine learning technology. To support its growth, the company has recently moved to a new, larger office.

■ San Francisco-based company *Marshall Strategy* has appointed **Elaine Stern** as vice president, research and insights.

Stern

■ **Richard Boyko** has joined research company *GfK* as country lead for consumer insights and marketing effectiveness in Belgium.

■ New York-based consumer insights platform *Suzy* has added **Tanya Kolosova** to its leadership team as senior vice president, data and insights.

■ New York-based investment bank *Oberon Securities* has added research industry professionals **Kristin Luck** and **Sima Vasa** as advisors.

■ San Francisco-based cannabis operator *NorCal Cannabis* has appointed **Jeffrey Graham** as vice president business intelligence. Graham previously led the research team at The New York Times and served as the head of advertising research for the Americas at Google. NorCal Cannabis has also appointed **Alex Lopoukhine** as director of brand and product marketing and **Nish Nadaraja** as director of retail marketing.

■ Potomac, Md., company *Full Circle Research Co.* has appointed **Olivia Trujillo** to lead its expansion into California as business unit leader.

■ Rhinebeck, N.Y., company *Phoenix Marketing International* has hired **Michele Orlick** as SVP, networks and media.

Orlick

■ **Eileen Doig** has been named global accounts director for Chicago-based research firm *Curion*.

■ San Francisco-based media analytics company *Zignal Labs* has appointed **Jennifer Granston** as head of strategy and insights.

■ Market research firm *Smarty Pants* has appointed **Blake Morin** as insights guru.

Morin

■ Reston, Va., firm *Comscore* announced that CEO **Bryan Wiener** has resigned from the company and stepped down from the board of directors. **Dale Fuller** has been named interim CEO while Comscore's nominating and governance committee initiates a search for a permanent CEO. Comscore President **Sarah Hofstetter** will also resign. The company has no immediate plans to fill her position. In addition, **Irwin Gotlieb**, **Joanne Bradford** and **Kathi Love** have been appointed to Comscore's board of directors.

■ Bethesda, Md., data-centric security company *Fasoo* has appointed **Deborah Kish** as executive vice president of marketing and research.

■ Stockholm-based technology provider *Cint* has appointed **Indie Blackwell** as EVP of EMEA.

■ The *Canadian Research Insights Council* has appointed **John Tabone** as interim chief administrative officer.

■ In London, data services firm *Maru/Blue* has hired **Claire Treloar** as business development manager on the agency sales team and **Simon Gallagher** as business development manager on the enterprise and market research sales team.

■ Baldwinsville, N.Y., company *Research & Marketing Strategies* has hired **Heather Kubacki** as graphic designer and marketing coordinator.

Kubacki

■ *Stay Metrics*, a South Bend, Ind., company that provides driver retention tools for motor carriers, has appointed **Bradley Fulton** as director of research and analytics, responsible for leading the company's survey products and research team.

■ **Frédéric-Charles Petit**, CEO of *ITWP Group*, has been appointed to the *ESOMAR Foundation* board. The ESOMAR Foundation is the charity arm of research association ESOMAR.

■ Teaneck, N.J., shopper insights agency *PRS IN VIVO* has named **Ian Elmer** as United States managing director, in charge of leading the company's U.S. client development and qualitative teams.

■ Westlake Village, Calif., research and strategy firm *SmithGeiger* has added **Robert Wendt** as senior research analyst.

■ Jersey City, N.J., consumer behavior and location sciences company *SITO Mobile Ltd.* has appointed **Lauren Wray** as chief revenue officer.

■ London-based researcher *Kantar* has appointed **Reed Cundiff** as CEO, North America region. He takes over for **Wayne Levings**, who will return to the U.K. to continue in his role as head of global clients.

■ Research company *Savanta* has expanded its rebranded insight specialist offering in the Americas, starting with the U.S. and Canada. Savanta was formed by *MIG Global* combining its specialist agencies – *MorarHPI*, *VIGA*, *Charterhouse*, *Circle* and *Wealth-X* – into one global brand. **Vin DeRobertis**, former chief strategy officer of MIG Global, will head up all activity from Savanta's New York headquarters, working alongside **Yaron Brenman**, general manager of the Americas region. **Kyle Gollins** joins the team in New York as vice president of client development. Adding to the existing Toronto team is **Lily Nguyen**, senior project manager; **Nermin Aga**, senior project manager; **Davide Lombardi**, senior consultant; and **Jeremy Mullin**, director – client development.

■ *InterContinental Hotels Group* (IHG) has appointed **Matt Kistler** as senior vice president of global insights, analytics and data. Kistler is based at IHG's Americas headquarters in Atlanta.

■ Costa Mesa, Calif., research company *J.D. Power* has hired **James Beem** as managing director of its global health care intelligence division.

■ Toronto-based researcher *Hotspex* has added **Scott Barlow** to the U.K. office as vice president, research.

Belz

■ In London, *SurveyHealthcare* has appointed **Lena Belz** as head of European operations.

■ Research company *Ipsos* has promoted **Kristen Kehoe** as the leader of its new Generation Ipsos analyst development program for entry-level researchers. Additionally, **Debi Lee** has been named president, human resources head for North America.

■ Data analytics company *605*, New York, has appointed **Noah Levine** as chief revenue officer and **Caroline Horner** as senior vice president of product management.

■ San Francisco-based audience insights and measurement platform *Quantcast* has appointed **Rueben Vijaratnam** as regional head, Malaysia, based in Singapore. The company has also recently appointed **Richard Knott** as business development director for Quantcast APAC.

■ Brand consultancy *Hall & Partners* has appointed **Sue Klinck** as global head of people and culture, a newly created role.

■ Toronto-based research technology platform *Methodify* has appointed **Jonathan Hyde-Barnes** as vice president, client development and **Melissa Hugh** as vice president, client success.

■ New York-based technology company *Integral Ad Science* has appointed **Tony Marlow** as chief marketing officer.

■ B2B agency *DWA*, a Merkle Company, has named **Mollie Jolliffe** as senior VP and general manager of its San Francisco office.

■ Research company *Kadence International* has added two to its London team: **Emma Muckersie** as head of global marketing and **Kim Adjei** as an insight manager.

■ **Mike Garibaldi** has been named COO/CFO for Chicago-based company *Curion Insights*.

■ **Duncan Lawrence**, co-CEO of *Market Strategies International-Morpace*, will assume a new role as strategic advisor. In June 2018, the two market research firms combined into one as part of an acquisition by STG. **Melissa Sauter**, who shared the co-CEO title with Lawrence, will fully assume the position of CEO. **Jason Mantel** will remain head of the automotive practice.

■ Boston-based digital experience intelligence company *Decibel* has appointed **Adam Greco** to its advisory board. Greco is a senior partner at digital analytics consulting firm *Analytics Demystified*.

■ Sterling, Va., information services company *Neustar Inc.* has appointed **Gregg Galletta** as vice president of data strategy.

■ **Jim Gallagher** has joined *Warner Bros. Pictures*, Burbank, Calif., as executive vice president, marketing, animation and family.

■ Partner marketing analytics firms *Marketscience and Truesight* have moved **Nitesh Sahay**, managing director and associate partner, to the London office from Delhi, India. In the U.K., Sahay will join **Peter Cain**, founder of Marketscience, to spearhead product development and provide dual support to both U.K. and India clients.

■ Alexandria, Va., marketing and analytics solutions firm *Fishbowl Inc.* has named **John Martin** as chief revenue officer.

■ Video insight platform *Voxpopme* has promoted **Jenn Vogel** to VP of marketing, while **Cedric Guy** has been appointed as VP of partnerships.


Vogel

■ **Kari Mannina** has been named global strategy director for Chicago-based research company *Curion*.


Guy

■ Research company *Ipsos*, New York, has appointed **Julia Clark** as head of marketing and communications for North America.

■ Irvine, Calif., skincare and wellness products company *Arbonne International* has named **Carole Diarra** as chief marketing officer. As part of her role, Diarra will lead the company's brand and product marketing, research and innovation and consumer insights.

■ London-based cultural insights and strategy consultancy *Crowd DNA* has appointed **Yuka Uchijima** and **Dunstan Kornicki** each as strategic insights director.

■ In Detroit, research company *Ipsos* has appointed **Jacob George** as executive vice president and leader of its U.S. automotive quality business.

■ *Marketing Management Analytics*, a business unit of research company Ipsos, has hired **Michael Bertie** as senior vice president.

■ Emeryville, Calif., research and strategy consultancy *Greenberg Strategy* has added three to its leadership team: **Diana Bailey** and **Faith Markham** both as vice president, strategic planning; and **Laura Sigman** as director of marketing.


Bailey


Markham

■ Market research services company *Knowledge Excel* has promoted **Tarun Khanna** to operations manager, while **Mohd Faraz** has been appointed as head of the company's Conjoint Centre of Excellence.

■ San Francisco-based insights platform *UserTesting* has appointed the following: **Kaj van de Loo** as chief technology officer; **Mona Sabet** as chief corporate strategy officer; and **Mike Dillon** as an independent director to the company's board.

■ *RTi Research*, Norwalk, Conn., has promoted **Melissa Usseglio** to senior vice president.

■ In New York, research company *Ipsos* has hired **Peter Mackey** as executive vice president and head of its user experience and human factors practice.

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Research Industry News

News notes

■ **Olson Research Group** will donate over $2,000 to **Alex's Lemonade Stand Foundation** in support of fighting childhood cancers. The donation was raised as a result of the basketball competitions at Olson's exhibit booth during the Quirk's Event in Brooklyn, N.Y., in March.

■ Roswell, Ga., company **MMR Research** is celebrating its 20th anniversary in 2019.

■ **The International Organization for Standardization** has brought together global standards boards – including the Marketing Accountability Standards Board – to publish ISO 20671, a global standard for brand evaluation designed to grow brand-owner value.

■ Irvine, Calif., research company **Horizon Consumer Science** is celebrating its 25th anniversary.

■ **Nielsen**, New York, has been granted accreditation by the Media Rating Council for its Television Audience Measurement service in 28 cities, offered in Mexico through its joint venture Nielsen IBOPE.

■ Insight consultancy **Firefish** and the numbers lab, Firefish Group's quantitative consultancy, have been awarded ISO 27001:2013 certification for their Information Security Management System, covering their U.K. offices at Tower Bridge Road, London.

www.quirks.com/articles/2019/20190615.aspx

■ Springfield, Mass., transcription and editing service **Modern Day Scribe** is celebrating its 25th anniversary.

■ Boston-based researcher **Protobrand** has joined **Quit Big Tobacco**, an initiative aimed at taking talent and expertise away from the tobacco and e-cigarette industries. By taking the pledge, Protobrand will not work directly with tobacco and e-cigarette companies or agencies that help such companies promote smoking or vaping.

Acquisitions/transactions

■ U.K.-based social intelligence company **Brandwatch** has acquired research company **Qriously**.

■ Consumer insight agency **InSites Consulting** has acquired Paris-based creative crowdsourcing firm **eÿeka**. With the acquisition, InSites Consulting will provide more impact from the consumer insights generated by clients and help them develop ideas and concepts that can spur business growth. Concurring with the acquisition, InSites Consulting has opened a client service office in Paris.

■ **The Stagwell Group**, a Washington, D.C.-based private equity firm, has acquired B2B digital marketing company **MultiView Inc.** Details of the transaction were not disclosed.

Alliances/strategic partnerships

■ Customer insights and messaging consultancy **Engagious**, New York, and Philadelphia-based research company **Focus Pointe Global** have formed a partnership to conduct a series of monthly swing voter focus groups in key battleground counties across the U.S. The first focus group will be conducted in Appleton, Wis. Voters selected to participate in the groups will consist of those who voted for Barack Obama in the 2012 election and then voted for Donald Trump in 2016 and those who voted for Mitt Romney in 2012 and then voted for Hillary Clinton in 2016. Video footage from each session as well as analyses and reports will be published monthly.

■ Chicago-based researcher **IRI** has formed a relationship with convenience store chain **Casey's General Stores**. Casey's will provide IRI with access to its point-of-sale from more than 2,100 stores to support its account-level insights for the c-store channel. IRI is also expanding relationships with Speedway, Circle K, EG Group and other convenience store chains across North America.

■ New York-based consumer data ecosystem **Veriglif** has announced that **L&E Research** and **Apps That Pay** have joined its founding members program.

■ Insights solutions company **Toluna** has partnered with **Cintrifuse**, an organization created to accelerate Cincinnati's start-up ecosystem. The partnership will allow Cintrifuse to offer members of its entrepreneur community access to Toluna's consumer insights platform. The companies will also issue reports about topics of interest to the business community.

■ Costa Mesa, Calif., research company **J.D. Power** has formed an alliance with digital intelligence firm **Centric Digital** to jointly develop a range of new customer experience measurement and digital intelligence solutions. The focus will be on industries that include automotive, financial services, insurance, travel and hospitality, utilities, technology, telecommunications and health care.

■ **WeedWeek**, a media company for cannabis news, has formed a partnership with market research firm **SoapBoxSample**, creating a council consisting of thought leaders and influencers in the cannabis space to provide insight into the industry. SoapBoxSample has been conducting cannabis research since 2016 and recently launched the CANNApinon poll, a national bi-weekly survey of cannabis consumers.

■ New York-based data science company **Dstillery** and Los Angeles-based research platform **Fuel Cycle** have formed a partnership designed to give businesses a better understanding of consumers by pairing stated and observed consumer preferences. Through the partnership, Fuel Cycle clients can use Dstillery AI audience data to build branded segments models off of primary market research data.

■ **Rybbon**, a McLean, Va., digital incentives and rewards platform, has partnered with Boulder, Colo., survey software company **SurveyGizmo**. The partnership centers around an integration that allows SurveyGizmo users to incorporate survey rewards delivery into their survey process.

■ The Division of Social Sciences at the **UCLA College** and global insights consultancy **LRW** have launched The UCLA Social Sciences LRW Big Data Research Partnership, a new initiative that will enhance the division's big data research capabilities and provide students with opportunities to learn new skills in data analytics. An investment from LRW will provide a two-quarter data science and social justice course sequence at UCLA to be offered in fall 2020, subject to the approval of the social data science minor in the 2020-21 academic year. The investment will also support data science workshops, roundtables and faculty and graduate student research. Additionally, UCLA students will have the opportunity to work as paid market research interns with the marketing and data science team at LRW.

■ **Zoo Atlanta** and Atlanta-based experience strategy group **MMR LIVE** have formed a partnership. MMR LIVE will help the zoo maintain its member relationships through a combination of regular assessments of their on-site experiences and operationalized recommendations to improve them.

Association/organization news

■ **The Path to Purchase Institute** (P2PI), a member-based community for consumer goods professionals and a division of business intelligence platform EnsembleIQ, launched Rise, a new industry magazine, in May. Rise, an acronym for "Retail Intelligence for the Strategic Enterprise," combines P2PI's publication Shopper Marketing and Consumer Goods Technology. It will focus on best practices in consumer engagement, retailer relations, insights and analytics, enterprise excellence, emerging technologies and corporate strategy.

■ **Civicom Marketing Research Services** has donated $5,000 to the **Marketing Research Education Foundation**, a nonprofit that aims to provide children worldwide with access to a quality education.

■ A number of research and public opinion firms have come together to relaunch the **Marketing Research and Intelligence Association** (MRIA) after it ceased operations effective July 31, 2018. According to the MRIA Web site, the new iteration will have the same oversight role but a new approach that stresses transparency and inclusion. The research firms have released a letter that outlines basic principles for the new MRIA and say more information will follow. The Canadian Research Insights Council (CRIC), the industry association that was established in response to the MRIA's closure, released a statement, saying, "The CRIC board does not endorse this new initiative and believes it will only result in confusion in the marketplace and with regulators."

■ **The Canadian Research Insights Council** has appointed John Tabone as interim chief administrative officer.

■ **The Insights Association**, Washington, D.C., joined 24 other companies and business groups in filing an amicus brief at the U.S. Supreme Court, arguing against the addition of a citizenship question on the 2020 Census, saying it would reduce response rates and provide inaccurate Census data.

■ **Frédéric-Charles Petit**, CEO of **ITWP Group**, has been appointed to the **ESOMAR Foundation** board. In addition, Toluna has agreed to power the ESOMAR Foundation's Webinar program with its services. The ESOMAR Foundation is the charity arm of research association ESOMAR.

■ Trade organizations, including the **Insights Association** as a founding member, have launched the **Privacy for America** coalition, which will work with Congress to support enactment of federal consumer data privacy and security legislation. According to the Insights Association Web site, the coalition, working with privacy policy advisors, has outlined a model for a national law that would make personal data less vulnerable to breach or misuse and set forth nationwide consumer privacy protections.

■ The **Canadian Research Insights Council** (CRIC) is endorsing and sponsoring CAIP Canada, a new certification body that will offer the Certified

Analytics and Insights Professional (CAIP) designation. The initiative is being led by Robert Wong and supported by CRIC's interim Chief Administrative Officer John Tabone. CAIP Canada says its priority will be to adopt holders of the CMRP offered by the former MRIA, along with adopting fellows of the former MRIA and developing the pathways for practitioners seeking to earn the CAIP designation. It will also build a board of leaders who will be responsible for establishing the syllabus, defining the training pathways and overseeing the examination process.

■ The **Canadian Research Insights Council** will launch new membership categories to allow client organizations, agencies, academia, the media, suppliers and not-for-profits to join the organization.

Awards/rankings

■ Indianapolis-based customer experience advisory firm **Walker** was named Customer Experience Partner of the Year by software company **Qualtrics**. Workforce Science Associates, an employee engagement consulting firm, was recognized as the Employee Experience Partner of the Year. In addition, Walker has released the Walker Loyalty Matrix, designed for B2B companies. The solution employs a framework to measure customer loyalty and assess financial risk to improve customer retention, gain new opportunities and grow business account by account.

■ Canadian marketing and research consultancy **Sklar Wilton & Associates** has been named the No. 1 Employee Recommended Workplace among privately-held small businesses in Canada by the Globe and Mail and Morneau Shepell.

■ Leslie Wood, chief research officer of **Nielsen Catalina Solutions**, has been named the recipient of the 2019 Erwin Ephron Demystification Award by the Advertising Research Foundation.

■ Oslo, Norway-based research technology company **Confirmit** has received a Tech Culture Award by media company **TMC.** The award recognizes work cultures within the technology sector that continuously aim to improve work-life balances.

■ U.K. language services firm **Language Insight** has received the Queen's Award for Enterprise for International Trade 2019.

■ Research services firm **Confero** has received the 2019 **BBB Torch Award** for Marketplace Ethics. The award recognizes best practices in leadership, character and organizational ethics by the Better Business Bureau serving Eastern North Carolina.

■ **Anna Drewicz**, finance director for London-based research company **MESH Experience**, has been named a finalist for the 2019 FDs' Excellence Awards.

New accounts/projects

■ Fairfax, Va., consulting and digital services company **ICF** has selected Canada-based firm **Voxco** as its survey software provider. The Voxco survey system will be used by ICF's U.S. and EU survey operations. ICF conducts large-scale phone and Web survey programs for government agencies, nonprofit organizations and corporations.

■ **UNICEF** has engaged Auckland, New Zealand, research solutions firm **Infotools** for its data processing and visualization needs. Infotools Harmoni will be used by the market research team for UNICEF's private sector fundraising and partnerships division to handle data input from multiple sources, database creation and analysis functions.

■ Survey solutions firm **Opinion Access** has chosen Canada-based company **Voxco** as its multimode survey platform provider. Opinion Access will use Voxco's survey system to manage its survey operations in Florida, New York and offshore survey call centers where the company runs field projects in over 25 countries.

New companies/new divisions/relocations/expansions

■ Singapore-based agency **User Experience Researchers** has opened a new business venture in Vietnam to provide user testing and interaction design services in Asia.

■ Tom Austin, Toby Bell and French Caldwell, former vice presidents of research company **Gartner Inc.**, have launched **The Analyst Syndicate**, a network of independent industry analysts. Jeffrey Vining and Steve Hawald, former analysts at Gartner, have also joined the network. Members contribute research through The Analyst Syndicate and provide services through independent firms. Through sponsorships, technology vendors and service providers also participate and contribute insights through sponsored blogs. The Analyst Syndicate has published research insights, available on its Web site, with additional value-added services for sponsors available.

■ London-based researcher **Kantar** has announced that all of its services and offerings will be delivered under the Kantar brand name, effective April 2. All other brands will be retired, including: Kantar Consulting; Kantar Health; Kantar IMRB; Kantar Media; Kantar Millward Brown; Kantar Public; Kantar TNS; Kantar Worldpanel; Lightspeed; plus all country-specific brands.

■ Research company **Maru Group** has changed the name of its business in Latin America from Maru/Moto to Maru/Matchbox. The name change will integrate the company's offerings and technology across offices in South and North America.

■ London-based brand strategy company **Mash Strategy Studio** will fully integrate into research company **Kantar**. Kantar Consulting, Kantar's specialist growth consultancy, acquired Mash Strategy Studio in Jan. 2018. Kantar announced that it will be delivering all its services and offerings under the Kantar brand name and will be retiring its other brands.

■ Australian marketing insights consulting firm **Faster Horses** has opened an office in Canberra. James Wunsch, who joins the firm as director of social and government research, will run the Canberra arm of the business.

■ Data and analytics agencies **ResearchBods**, **Bonamy Finch** and **LiFE** have partnered to create **STRAT7**, a new group that will help businesses and brands extract customer insights and interpret them to create data-driven strategies. STRAT7 will be led by CEO Barrie Brien, who will work with a management team consisting of Jonathan Clough and Robin Hilton at ResearchBods; Leigh Morris and Paul Carney at Bonamy Finch; and Michael Fisher at LiFE.

■ Raleigh, N.C.-based company **L&E Research** has expanded with the addition of **INGATHER Research & Sensory** in Denver. The INGATHER Research team in Denver will be added to L&E's network of qualitative research solutions.

■ Warrendale, Pa., technology company **First Insight Inc.** has opened new offices in London and Chennai, India. The company has also added 12 new currencies and 10 new languages to its merchandising platform.

■ Canada-based opinion and market research company **Angus Reid Global** has launched a public affairs research division, led by Demetre Eliopoulos as senior vice president and managing director.

■ Consumer intelligence platform **Frontier7**, New York, has rebranded as **SightX**.

■ London-based loyalty insights agency **Network Research** has rebranded as **Motif** and has launched its new Loyalty Framework.

■ William Yattah, formerly with **Toluna** and **Krealinks**, has co-founded **Humanizee SAS**. The company offers DiscussNow, a platform that allows companies to connect and discuss with audiences directly through messaging apps like WhatsApp, WeChat, Instagram and more.

■ Raleigh, N.C.-based company **L&E Research** has opened an office in Austin, Texas. The office is a remodeled facility in the location formerly housed by **Tammadge Market Research** and includes the addition of a third multipurpose suite and a room for usability testing. This is the company's eleventh location.

■ Customer experience analytics platform **OdinText** has changed its name to **OdinAnswers**.

■ London-based cultural insights and strategy consultancy **Crowd DNA** will open an office in Sydney in July. Elyse Pigram, a strategic insights director in London, will relocate to Sydney to head up the launch.

■ Melville, N.Y., qualitative research services firm **Recruit and Field** has introduced Our Think Space, a new focus group facility located inside the company's headquarters.

■ U.K.-based research company **B2B International** has opened an office in Edinburgh, Scotland. Imogen Williams, the company's research manager, will move from Manchester to Edinburgh.

■ Canada-based research company **Corporate Research Associates** is relaunching itself as **Narrative Research**. The company's new ownership team includes Margaret Brigley as CEO, Margaret Chapman as COO and Peter MacIntosh as chief research officer.

■ The **ISA Family of Companies** has opened a new 110-station call center in Las Vegas.

■ San Francisco-based insights platform **UserTesting** will be opening its first international office located in Edinburgh, Scotland, in the coming months.

■ **Ipsos Hong Kong** has moved its office to Hung Hom to accommodate its growth.

■ Belgium-based research company **EyeSee** has opened an office in London, led by Payal Patel.

■ Research agency **ABA Research** has relaunched as **Kokoro**. The company has created three teams – customer research, customer experience and insight consultancy – and has added Caroline Bates to its insight consultancy team.

Research company earnings/ financial news

■ Oslo, Norway-based research technology company **Confirmit** reported a 43 percent increase in its voice of the employee business as a result of its new solution for employee engagement. The company has also announced a 25 percent increase in its R&D team, with new team members joining in offices in EMEA and North America.

■ London-based technology start-up **Attest** has raised $16 million in a Series A investment round to expand its consumer growth platform, which allows companies to engage directly with consumers.

■ **Native**, a New York-based company that connects organizations with local consumers to gain insights, closed a $2.5 million round to fuel its global growth.

■ Alpharetta, Ga., sample solutions firm **P2Sample** reported that Q1 2019 revenue increased by 44 percent year over year. In the same period, the company registered more than 2.5 million survey completes in Q1. P2Sample also expanded its staff, adding six new employees over the past year.

■ Research company **Ipsos** reported revenue of €422.1 million for the first quarter of 2019, a 15 percent increase compared to the same period last year.

■ **Nielsen**, New York, announced revenues of approximately $1.6 billion for the first quarter of 2019, down 2.9 percent compared to the first quarter of 2018.

■ **Forrester Research**, Cambridge, Mass., reported total revenues of $100.6 million for the first quarter of 2019, compared with $77.7 million for the first quarter of 2018. Research revenues increased 33 percent and advisory services and events revenues increased 23 percent compared with the first quarter of 2018.

CALENDAR OF EVENTS

••• can't-miss activities

IQPC will hold its CX Exchange for Retail event on **July 3-4** at the Hilton London Syon Park in **Middlesex, United Kingdom**. Visit bit.ly/2WObiK8.

featured

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

KNect365 will hold the Summer Insights Fest, a collection of three events (The Shopper Insights & Retail Activation Conference; The UX Research & Insights Summit; and The Insights Leadership & Talent Summit) on **July 15-17** at the Radisson Blu Aqua in **Chicago**. Visit bit.ly/2VNrHRt.

Southwest Chapter of the Insights Association will hold its Educational Forum on **August 7-8** in **Phoenix**. Visit bit.ly/2H24d1B.

AMA will hold its 2019 Summer Academic Conference on **August 9-11** in **Chicago**. Visit bit.ly/2V6Orrw.

Worldwide Business Research will hold its eTail Boston 2019 event on **August 19-22** at The Sheraton in **Boston**. Visit bit.ly/2GhsVMw.

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

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

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

Corinium Global Intelligence will hold its Chief Data & Analytics Officers, Europe 2019 event on **September 24-25** in **Berlin**. Visit bit.ly/2PO8ARU.

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

Applied Marketing Science will hold a workshop, 'Listening to the Voice of the Customer,' on **October 16-17** in **Chicago**. Visit bit.ly/2VHqewj.

Society of Insurance Research will hold its Annual Conference & Exhibit Fair on **October 20-22** in **Charlotte, N.C.** Visit bit.ly/2JbelZJ.

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

Insights Association will hold its 2019 Corporate Researchers Conference (CRC) on **October 22-24** in **Orlando, Fla.** Visit bit.ly/2JkdB58.

Research & Results will hold its annual trade show on **October 23-24** at the MOC Convention Centre in **Munich**. Visit bit.ly/2vKl7gg.

University of Alberta International Institute for Qualitative Methodology will hold the Qualitative Health Research Conference on **October 25-29** in **Vancouver, BC, Canada**. Visit bit.ly/2oFICW0.

LIMRA will hold its Annual Conference on **October 27-29** at the Sheraton Boston Hotel in **Boston**. Visit bit.ly/2DRdxok.

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

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

ESOMAR will hold its FUSION 2019 event on **November 10-14** in **Spain**. Visit bit.ly/2VmroOm.

Corinium Global Intelligence will hold its Chief Data Analytics Officers event on **November 18–20** at the Seaport Hotel & World Trade Center in **Boston**. Visit bit.ly/2J6EI2R.

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

KNect365 will hold the DIY Market Research Conference on **December 2-3** in **New York**. Visit bit.ly/2FXJm2q.

KNect365 will hold The Media Insights & Engagement Conference on **January 27-29** at The Royal Sonesta in **New Orleans**. Visit bit.ly/2eyPzmx.

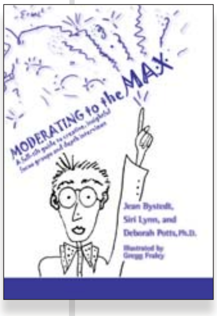
QRCA will hold its 2020 Annual Conference on **January 29-31** in **Austin, Texas**. Visit bit.ly/2vKUrfc.

2020 Pharma Market Research Conference USA will be held on **February 5-6** in **Newark, N.J.** Visit bit.ly/1Sh6Yhi.

NMSBA will hold the 2020 Neuromarketing World Forum on **April 1-3** in **Los Angeles**. Visit bit.ly/2HnGcm3.

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

ESSENTIAL READING FOR RESEARCH PROFESSIONALS



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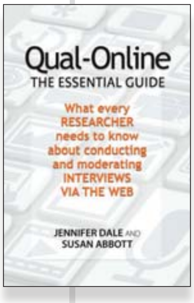

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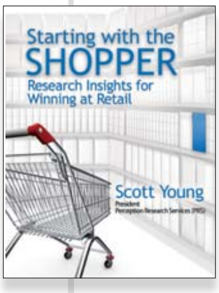

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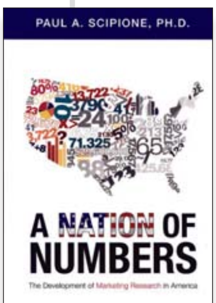

A Nation of Numbers

The Development of Marketing Research in America

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

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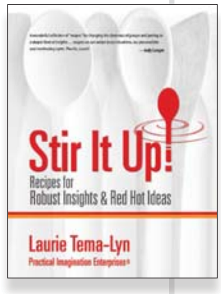
Recipes for Robust Insights & Red Hot Ideas



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

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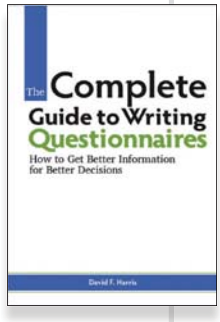
The Complete Guide to Writing Questionnaires

How to Get Better Information for Better Decisions

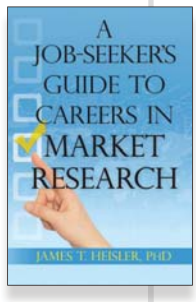


A comprehensive framework for creating questionnaires from planning research to support decision-making, conducting qualitative research, and planning the questionnaire before you begin writing questions, with guidelines to make questions clear, answerable, easy, and unbiased for the three most common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

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

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

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



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

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10 minutes with...

Tiffany Ng
Senior Manager, Consumer Insights, Experian

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

Prior to working in marketing research you were a marketing analyst in the automotive and TV industries. What motivated you to pursue a career in MR?

Being a marketing analyst allowed me to play around with data, learn to value it and understand its importance to any business. But I wanted to learn the other side of it. Over time it became clear to me that behavioral data was only one piece of the pie. And I wanted the whole pie. One commonality, or consistency, throughout my career is that I love to tell stories with information. Data, words, images all can be used to tell a good story. So it was more than just data for me. It was being able to tell a complete story. Market research opened the door to more information.

Do you have any tips for researchers looking to conduct qualitative research in a quant-focused company?

Truly understanding the value of each methodology will help tremendously and set you up for success. I work for a data company. In fact, it's one of the top reasons I wanted to join Experian. They're known for their data assets and I love data. But what market research has taught me is that there are many different ways to answer a question. And knowing the right way to get the right answer is the value that a corporate researcher brings to the table. I often get asked to run a specific type of study – "I want to run a focus group" – but understanding the stakeholder's objectives is what's really important. If we don't know what we're looking for then we can't propose a way to try and find it. And thus, we can get lost in the methodology. As we enter the experience economy, listening to people is more important than ever. Recognizing that data/quantitative studies only tell part of the story will force us to consider different ways of getting answers. Knowing when and where qual fits in will produce better insights and more trust from your stakeholders.

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

Experian has recently launched some pretty cool products in a short amount of time – CreditLock, Financial Profile and Experian Boost. From exploratory research to usability testing to ad concept testing and then to VOC, my team has aligned to support the business across each of these phases. The difference being that we've been able to be more proactive and less reactive. It sounds small but there's so much freedom packed into this feeling of being able to show impact this way. We participated in some design thinking workshops where conversations and planning were heavily influenced by the research my team had conducted. Our segmentation was being used and we had a say in the process. This put us in a position to be integrated into the product-development process from the beginning. We've really started to put the customer as the center of our business.

Read the full interview at www.quirks.com/articles/2019/20190622.aspx.