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Quirk's Marketing Research Review
March/April 2020
Volume XXXIV Number 2
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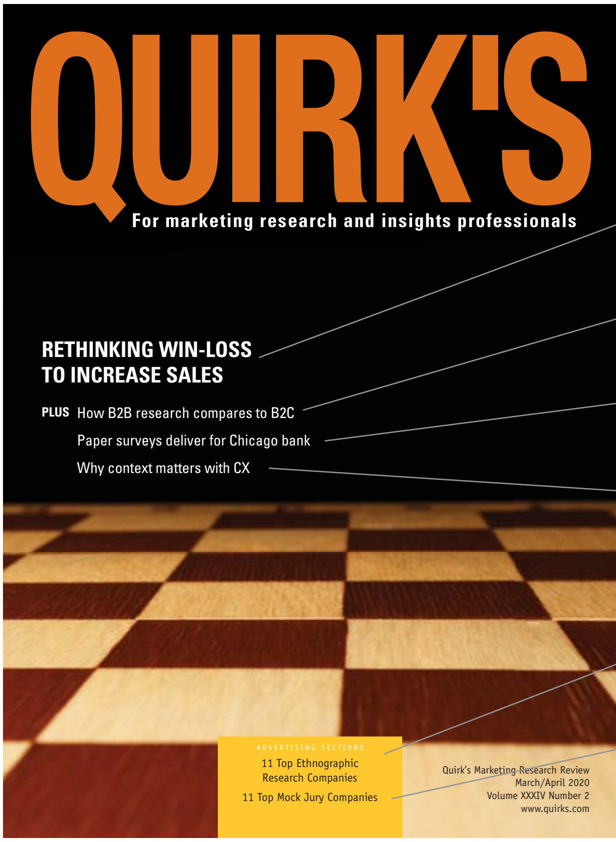

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COMMUNICATION

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Cincinnati	Apr 21-24	Cincinnati	Dec 8-11
Cincinnati	July 14-17		

Q02 - Specialized Moderator Skills for Qualitative Research Applications $3,475

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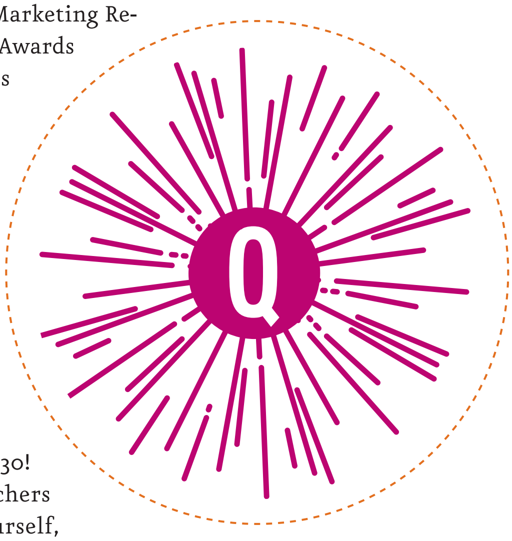
Help shine a much-deserved spotlight on the best in the industry by submitting nominations for individual and team achievements as well as projects, MR tools and companies.

Nominations open March 30 and close July 8. Take advantage of early entry pricing until April 30! The awards are open to all researchers worldwide. You can nominate yourself, your co-worker(s), your company or your clients.



For information on categories, rules and eligibility – along with a full list of 2019 winners and finalists – visit quirksawards.com.

// E-newsworthy

The value of research beyond ROI

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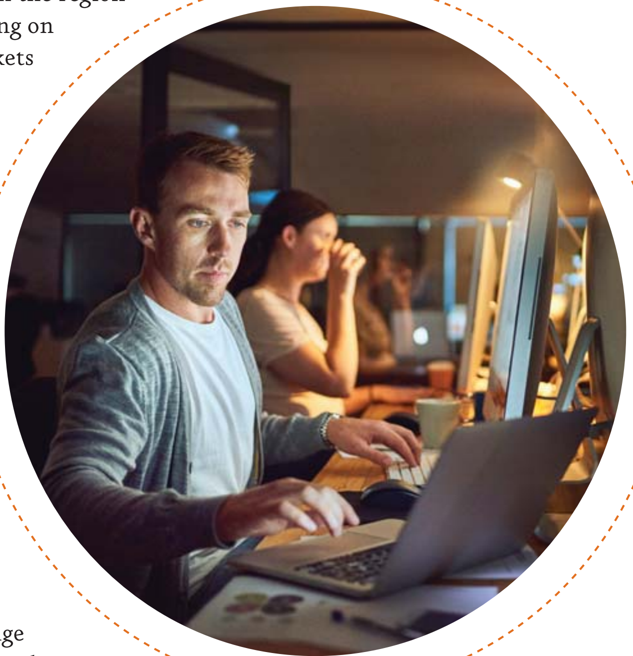
••• b2b research

Europe's tech startups have the edge, survey says

Both the vision and business models of European tech startups may be giving them advantages over their U.S. counterparts when it comes to recruiting and growth, according to a survey of more than 1,000 C-suite executives and founders of tech firms in the U.S., U.K., Germany and France commissioned by accommodation search firm trivago.

Technology leaders feel that European companies are superior to U.S. firms when it comes to these factors: having a greater focus on brand (97% agree); benefiting from higher online marketing and sales activity in the region (93% agree); focusing on international markets more quickly (85% agree); and spending more time on development before going to market (80% agree).



Diversity may be another key benefit for EU companies; 84% of leaders feel the EU's working culture is attractive to global talent. However, a key advantage for U.S. firms is that they are less risk averse. Nearly nine in 10 leaders feel EU startups are more cautious than U.S. startups.

When asked about growth risks, tech leaders surveyed cited these top concerns: lack of talent (52%), data security (52%) and government regulation (51%). In the U.S., regulation is clearly the biggest risk. Nearly three-quarters (72%) of tech leaders feel regulations have made it more difficult to access funding over the past five years. In the U.K. and France, lack of talent is the most serious concern. In Germany, both regulation and data security lead the list of risks.

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••• health care research

55 to 65 is long-term care insurance 'sweet spot'

The vast majority of buyers of traditional long-term care insurance policies are between the ages of 50 and 69, reports Jesse Slome, director of the American Association for Long-Term Care Insurance. "Just over 76 percent of new buyers of a long-term care insurance policy do so after turning age 50 and before they turn 70," Slome says. "It is important to understand the marketplace in order to know how to effectively communicate with prospective buyers."

Most buyers today are between ages 55 and 59 (24.7%) or between 60 and 64 (23.2%). "The sweet spot for buying traditional health-based long-term care insurance is between 55 and 65, before you go onto Medicare," Slome says. "Once on Medicare, many individuals take advantage of the excellent health preventative tests and covered doctor visits, which is a good thing because these exams often detect problems that can be addressed," Slome says. "But, the exams also can uncover conditions that may make it impossible for an individual to health qualify for long-term care insurance. That's why we urge action prior to reaching Medicare age." Data on long-term care insurance sales by issue age as well as data on benefit period selected is available at www.aaltci.org.

By Joseph Rydholm, Quirk's Editor

Pew article series recaps some 'striking findings'


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Joe Rydholm can be reached at joe@quirks.com

One of my favorite reads in the new year is Pew Research's "striking findings" series in which the organization annually looks back to the recently ended year and offers up a list of noteworthy demographic and cultural data points and trends from the myriad surveys and analyses it conducts.

Given the organization's broad purview, the Pew findings are a generally comprehensive barometer of things percolating in the larger zeitgeist and it's always good to see some numbers attached to trends that are talked about in the media and in conversations with friends.

As taken from Pew Research Center Senior Writer/Editor John Gramlich's "19 striking findings from 2019" article, here are some of the 19.

- Hispanics are projected to be the largest racial or ethnic minority group in the 2020 U.S. electorate, overtaking the number of black eligible voters for the first time. Combining Hispanic (13.3% of eligible voters), black (12.5%) and Asian (4.7%) voters, non-whites will make up a third of eligible voters, their largest share ever.
- Roughly a third of Gen Zers (35%) say they know someone who prefers to be referred to using gender-neutral pronouns. Survey authors, take note: your future respondents (Gen Zers – Americans born after 1996) are the most likely to say that forms or online profiles that ask about a person's gender should include options other than "man" or "woman." Fifty-nine percent of Gen Zers hold this view, compared with half of Millennials and four-in-10 or fewer Gen Xers (born 1965 to 1980), Baby Boomers (1946 to 1964) and members of the Silent Generation (born 1928 to 1945).
- The decline of Christianity is continuing at a rapid pace in the U.S. Around two-thirds of U.S. adults surveyed by phone described themselves as Christian – down 12 percentage points since 2009. Meanwhile, the "nones" – religiously unaffiliated adults who describe their religion as atheist, agnostic or "nothing in particular" – are at 26%, up from 17% a decade ago.
- Roughly six-in-10 U.S. adults say they don't think it is possible to go through daily life without having data (online and offline) collected about them by companies (62% say this) or the government (63%).
- Two-thirds of Americans support the legalization of marijuana, a dramatic reversal from two decades ago. The support spans gender, ethnicity and political affiliation (though Democrats remain far more likely than Republicans to favor it, 78% vs. 55%).
- Despite the economic troubles facing the news industry, 71% of Americans believe their local news media organizations are doing well financially. This belief endures even though only 14% of U.S. adults said they have paid for local news in the past year through subscriptions, donations or memberships. When asked why they don't pay for local news, around half of nonpayers (49%) point to the widespread availability of free content. Well, just be aware that if you continue not paying, there may not be any free news left to consume, folks.
- Confirming what any Twitter veteran has likely long suspected, Pew's data shows that the most active 10% of adult Twitter users in the U.S. produce 80% of all tweets sent by these users. (The median adult user tweets just twice a month.) When the tweets are coming from someone you like, it's not so bad but when they come from someone you find annoying it's, well, annoying. But that's what the block and mute functions are for, right? A follow-up study focusing on tweets about national politics found that 97% of tweets that were created by U.S. adults and mentioned national politics came from just 10% of users.
- A single person watching YouTube videos for eight hours a day with no breaks or days off would need more than 16 years to watch all the content posted by just the most popular channels on the platform during a single week. I think my youngest daughter is certainly up to the task.

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ASK THE EXPERT

Expert answers to important research questions.

How do you keep the brand engine running smoothly?

The engine in your car will run for about 15 minutes without oil before the resulting friction causes extensive damage. In the world of branding, trust is the oil or lubricant that facilitates the engine of branding. When we believe a brand aligns with our values and meets our needs, we're more likely to buy, repurchase and give the brand permission to extend itself.

Yet trust is becoming an increasingly rare commodity. Organizations like Pew Research and Gallup have tracked levels of trust over time and have noted the steady erosion of this valuable lubricant.

One of the industries that is experiencing the greatest erosion of trust is health care. This is a true crisis, because while we can simply stop buying or using most brands we don't trust, not trusting our health care can have a dire impact on the quality of our life – it can stop our engine cold. Recognizing this challenge of low trust, how can health care brands create a trusting emotional link with consumers?

We've researched and consulted with health care systems in the growing integrated delivery network (IDN) movement. From a branding perspective, IDNs make a particularly fascinating laboratory. Their basic premise involves moving beyond the old role of "sick care" to a comprehensive system – one that promotes wellness and community health. The evolution requires radical community trust.

This means reframing the way people think about the role of health care providers beyond sick care and extending into areas like community nutritional education, sponsorships of food markets, affordable housing, employment and creation of walkable communities.

It also means interfacing with new stakeholder groups like local governments and community organizers, with a growing number of competing interests and needs. An increasingly complicated engine with lots of new moving parts. Trust is the basic lubricant to ensuring this new engine performs well.

With a complex set of stakeholders, it's important to start with mapping the lay of the land. The model of human decision-making we use explores the deepest motivations that drive each stakeholder group's primary concerns. Understanding and mapping these concerns provides a firm foundation for strategy development.

For both the existing brand and the future IDN brand, we map equities and disequities. Among those different stakeholder groups, who is all-in? Who are the holdouts and why? Where are the points of friction in this complex engine?

Creating a master map is essential to developing effective strategies, particularly given the interconnectedness of the stakeholder groups. Where are the barriers and facilitators that will either impede or ease the process of reframing perceptions and extending into new areas? This map helps chart a clear path to achieving strategic outcomes.

In our interconnected world, engendering trust in a brand requires an increasingly systemic approach. The lessons we've learned while creating strategies for very complex IDN brands apply to brands across all industries.

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Senior Consultant
Heart+Mind Strategies
kschuchard@heartandmindstrategies.com

HEART+MIND STRATEGIES

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IN FOCUS

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

Q // Survey Monitor

••• entertainment research

A force of a franchise

Study identifies key aspect of Star Wars fans

Have you ever been the proud owner of an extendable plastic lightsaber? Do you look forward to May 4th with an abnormal amount of excitement? If so, you may belong to the one in four internet users who constitute the Star Wars fan base. According to a GlobalWebIndex article by Tom Morris titled, "The Fandom Menace: Profiling Star Wars' Influential Fanbase," the love of the space opera extends across generations and continents, with similar amounts of Star Wars love for Boomers (23%), Gen X (26%), Millennials (23%) and Gen Z (22%). North America is above average when it comes to fans (35%) but APAC (22%), Europe (22%), LatAm (24%) and MEA (25%) are not far behind.

This group seeks adventure in their own lives as well – about three in four say they want to explore the world around them and immerse themselves with different people, cultures and lifestyles. They're also an ambitious bunch, with two in three saying that they strive to fit as much into their day as possible and push themselves to be the best they can be (73%).

Being involved with a franchise as expansive as Star Wars, it's not surprising that two-thirds of this group say they're interested in films/cinema, while one in three see a movie in theaters at least once every two weeks. What are Star Wars fans watching? Films from other sci-fi/fantasy franchises. Fifty-six percent of Star Wars fans are also fans of Marvel movies, as compared to the 36% of all internet users. They keep this lead on other franchises as well, such as Harry Potter (54% to 32%), Spiderman (52% to 32%), X-Men (50% to 27%) and Disney (49% to 33%). While exploring new movies at the theater, Star Wars fans are 44% more likely than the average internet user to discover new brands through ads at the theater.

Star Wars fans are active online and they use the internet as an avenue to voice their opinions – in fact, they are 26% more likely than the average internet user to do so, with 40% of Star Wars fans stating that voicing their opinion is one of their main reasons for using the internet.

As frequent moviegoers, Star Wars fans enjoy discussing films online, with one in four posting their opinion about a film online each month. They also enjoy discussing music (21%), mobile phones (20%) and technology (20%) and are happy to join in discussions relevant to their interests. This speaks to the two in three Star Wars fans who agree that the internet makes them feel closer to people. In fact, this space is a valuable way to make new connections, with about four in 10 using the internet to meet new people and three in 10 using social media for the same reason.

Given that Star Wars fans are adept at connecting with others online, it makes sense that this group is 35% more likely than the average internet user to visit or use community-based platforms like Reddit and Twitch, where open discourse is the norm.

In keeping with Star Wars fans' active internet life, they are more likely than the average internet user to engage with content relevant to them on social media. In the past month, 35% of this group has watched a consumer review of a product on YouTube and another

www.quirks.com/articles/2020/20200303.aspx

36% has posted a comment about a video on the platform. On Twitter, 20% have tweeted a question or comment about a company, brand or product and 23% have tweeted or retweeted a celebrity. This group is also active on Facebook, where 22% have commented about a TV show they're watching and 26% have posted a comment about a product or brand.

The survey was conducted by GlobalWebIndex and polled 145,271 internet users aged 16-64.

••• health care research

To insure or not insure

Survey examines health insurance habits among Millennials

A study by health care resource HealthPocket examined the health care habits of Millennials and found that the cohort has a complicated approach to tackling health. Most (89%) Millennials surveyed have some form of health insurance, which is in line with the national average despite the generation having high levels of underemployment. However, 54% had been without health insurance at some point in their lives and 47% had asked for help from their parents when it came time to pay medical bills.

Millennials are comfortable relying on technology when it comes to their health care. Seventy-nine percent said they would Google an ailment before making an appointment to see a doctor and 63% felt that they should be able to text their doctor directly. Exactly half of respondents have utilized wellness benefits of their health insurance policies.

When it came to ranking priorities, 68% of Millennials rank health insurance over going out to dinner, going on vacation or going to a concert. Paying for health insurance remained a priority over other forms of insurance as well, though followed closely by car insurance. While 51% of Millennials surveyed had life insurance, an impressive 25% of pet-owning respondents also had pet insurance, compared to the average across all ages of 5%.

When it comes to pets, Millennials rethink where health care stands on their priority list – 62% reported that, given the choice to either go to the doctor or take their pet to the vet, they would choose to bring their pet in for medical care rather than seek care for themselves.

The survey was conducted by HealthPocket and polled 1,000 people in the U.S. aged 20-35. The poll was weighted to get representative samples from each state based on population.

••• employee research

Dressed to impress?

The American workplace is becoming increasingly casual

It's a fashion revolution in the American workplace – according to a study by Randstad US, 33% of respondents said they'd quit their job (or turn down a job offer) if they were required to follow a conservative dress code. While that might sound extreme, casual dress really is becoming the new norm, with 79% of respondents reporting that their current employers' dress code policy is either business casual (26%), casual (33%) or non-existent (20%).

Despite more casual workplaces overall, most people still prefer more conservative attire when interviewing for a job. Sixty-five percent feel it's important to wear a suit during an interview, regardless of how formal that company's workplace actually is. In fact, 42% percent say they'd rather be 20 minutes late to an interview than show up looking disheveled or underdressed. Half (50%) of respondents say they will wear business attire from the waist up and casual clothing from the waist down for a video interview.

However, U.S. workers do draw the line for casual dress at some point. Most workers feel ripped jeans (73%) and leggings (56%) are not appropriate workwear, even in a business casual work setting. Fifty percent of respondents believe very high heels (defined in this survey as over three inches) look unprofessional, while 40 percent say the same about open-toed shoes of any kind.

Millennials find themselves at the center of this turning point in workplace dress – 38% of 25-35-year-olds admit they've been asked to dress more professionally by their manager or HR and 28% of all respondents say someone else's clothing at work has made them feel uncomfortable because it was too revealing. However, most (63%) workers aged 18-35 say they prefer dressing up for work as it boosts their confidence and performance, while only 51% of workers aged 35-64 agree. Forty percent of Millennials would rather spill coffee on themselves before a big meeting than show up wearing the same outfit as their boss.

Gender differences exist as well – 74% of men surveyed own a suit, compared to 45% of women. On the flip side, over half (58%) of women say they've had to bring a sweater or blanket to work because of their cold office, compared to 30% of men.

The survey was conducted by Research Now on behalf of Randstad US and polled 1,204 employed people between the ages of 18 and 65+ and included a nationally representative sample balanced on age, gender and region.

••• shopper insights

The rise of the gift card

Gift cards are becoming more popular for both the gift giver and receiver

If you've ever viewed gift cards as a cop-out present, think again. According to a study by Blackhawk Network, gift cards are the most requested holiday gift item in America – and gift-givers are beginning to catch on, spending 7% more on gift cards during the 2019 holiday season than in 2018.

Digital gift cards also experienced a 4.5% increase, showing that e-gifts are gaining ground despite the popularity of physical gift cards. E-commerce sales during the holiday were up more than 12% and digital gift cards accounted for nearly 20% of holiday gift card sales in 2019. The study found that 23% of surveyed respondents reported receiving digital gift cards.

Consumers who receive gift cards can also enjoy skipping the post-holiday returns – and retailers can too. Thirty-three percent of surveyed consumers received a gift they were not satisfied with this holiday season. The National Retail Federation reports that 55% of consumers will return any unwanted gifts or holiday items within the first month of receiving them. Gift cards can help to alleviate some of the frustration of post-holiday returns for retailers and consumers alike.

The popularity of gift cards cannot be overstated; 80% of consumers reported receiving a digital or physical gift card for the 2019 holidays, making the cards a significant source of revenue for retailers. According to Blackhawk Network, about half (52%) of consumers expect to spend as much as $30 more than the value of their gift cards. Additionally, 53% plan to spend these cards within weeks of receiving them to take advantage of holiday sales.

The survey was conducted by Murphy Research on behalf of Blackhawk Network and sampled 3,000 respondents aged 18 and older. Gift card growth findings are based on 2018 and 2019 sales data from Blackhawk Network from over 50,000 merchant locations across the U.S.

••• gen z research

Digital natives and creatives

For Gen Z, technology and creativity go hand in hand

Gen Z are a creative bunch and they are not afraid to show it. According to a study by the Innovation Group, over half (51%) of Gen Z agree that their generation is more creative than previous generations. This group engages actively with their creative sides – when asked how they spend their free time offline, over three in four (77%) Gen Zers select at least one creative activity such as drawing, illustrating, journaling or playing an instrument. When asked how they spend their free time online, nearly half (48%) of Gen Z select at least one creative activity such as editing photos, creating memes or creating digital art.

The internet is a creative haven for this cohort, 55% of whom say they that they find social apps and the internet a more creative space than what they experience offline. A generation of digital natives, Gen Z experience a digitally influenced perception and experience of creativity and perhaps this speaks to the fact that creativity for Gen Z often involves more manipulation/alteration than observation/description/replication.

Gen Z find their creative groove in social apps (56%) and half of this cohort (50%) have used AR filters/lenses to enhance a photo or video of themselves or with friends; 43% have enhanced with emojis, 44% with a color filter and 51% with text or a caption.

One in four (27%) of Gen Z have adapted an app or website feature to do something that isn't typically available (for example, using a picture collage app or an app to add music, separate from the app they were posting with). When asked about digital creative tools, 35% of respondents chose Snapchat creative tools for creating art or editing photos, followed by Instagram (29%), VSCO (8%), Photoshop (23%) and iMovie (12%).

Gen Z find inspiration for creativity in a variety of places, such as social apps (49%), friends and family (44%) and personal experience (40%). This creativity speaks to an emphasis on self-expression within Gen Z. When asked to develop a slogan for their generation, respondents overwhelmingly chose some variation of "be yourself" such as "just be you," "living our best life," "do you" and "think for yourself" alongside more slogans aimed at social responsibility such as "save the planet," "there is no planet b" and "we are the future."

The study was conducted by the Innovation Group on behalf of Snapchat and polled 1,208 U.S. and U.K Gen Z respondents.

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.

Somebody's got to say it: The concept test needs a refresh

A lot is on the line to ensure that you advance the ideas and concepts with the greatest potential. For data-driven organizations, the mainstay has been the traditional concept test and purchase intent survey. In niche markets (mostly B2B and some B2C), surveys are expensive to scale, response rates are low and comparative benchmarks are lacking.

In these markets, organizations are forced to make decisions on low sample sizes, sequential monadic study designs, qualitative research or nothing at all.

Chooseology is different. It collects more impactful data from each respondent in a simulated e-commerce environment.

Concept strength is based on several implicit and explicit measurements: first choice in a competitive lineup, concept ultimately "purchased," time spent on each concept, movement between concepts and unique questions related to respondents' commitment to choices. Additionally, the highly engaging platform supports feature ranking and open-ended comments.

For existing products, clients can learn how to optimize their online presence. After studies, we have improved online-first choice by testing out image and copy variants. Clients also gain knowledge of online behaviors by product category. For example, in high-involvement and high-interest categories (pet products, diving equipment) time spent on concepts is an important indicator. In fast-moving consumer goods, the metrics linked to interest are different.

Chooseology will accommodate up to seven detailed listings. Coming this spring, a new version of Chooseology will allow for hundreds of items and filtering options – all extremely valuable information for optimizing online selling channels.

Best yet, users love the platform. After a full slate of studies in 2019, 96% of users positively rated their experience. Users appreciate the simulator's ease of use and similarities to online shopping.

User Comments

- I could easily click through to see various details about the items.
- Seemed like I was actually shopping!
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www.chooseology.com

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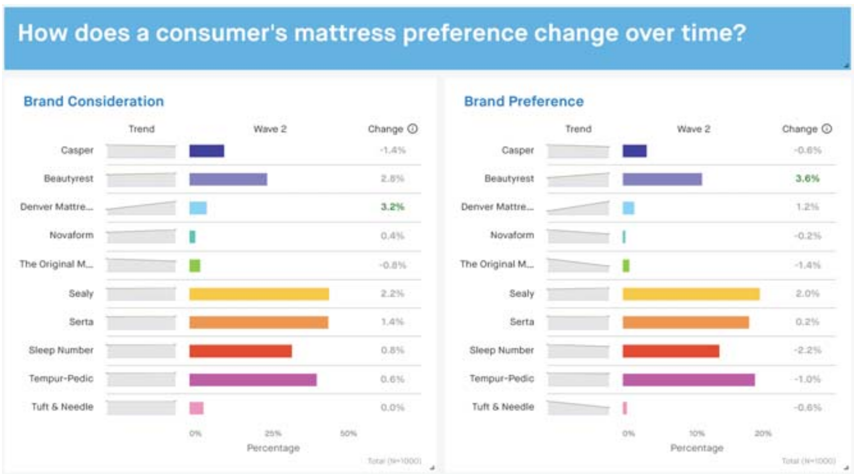
If you would like a demo please visit our website www.thecatalyx.com.

quantilope

Introducing quantilope's automated brand tracker

Quantilope automates brand tracking to make it easy to monitor changes to a brand's perception, performance and consumer behavior patterns over time. Managed on quantilope's end-to-end automated research platform, brand tracking is set up through waves (monthly, quarterly, annually, etc.) in local or multi-country studies to stay on the constant pulse of your consumers and brand KPIs.



Benefits of quantilope's brand tracking

- Live data with real-time results
- Automatic analysis and instant visualization
- Graphs and charts that continuously update with new waves
- Create custom crosstabs and build new segments in just minutes
- Automatic significance testing

Additionally, quantilope offers ad tracking to measure the effectiveness of advertising campaigns such as changes to a brand's awareness and preference before and after a campaign.

Each tracking project involves a single setup process. New waves begin automatically and new data is seamlessly added to your report while a team of certified research consultants are available for ongoing project support.

In today's market, winning brands will be those who leverage tracking to continuously measure the impact of new product launches, marketing campaigns and changes to your brand funnel. Qualified brands are invited to run a free pilot study using quantilope's advanced automated platform by reaching out to sales.us@quantilope.com using the subject line "qlp + quirks 2020."

www.quantilope.com

Toluna Celebrates 20th Anniversary with New Suite of Solutions

Toluna technology revolutionized and drove the future of the market research industry. Speed became and remains an industry constant and relentlessly needs updating. What was fast last year may not be in 2020 but research has also to offer the flexibility to fit with iterative innovation processes.

These iterative processes are the automation enhancements in our signature product, Toluna QuickSurveys. QuickSurveys enabled the industry to maintain research quality and reach that was once unimaginable: hundreds of thousands of panel community members comparing tens of thousands of products and sharing results in real time.

Toluna technology also empowered agility. The dexterity required to test a concept, turn on a dime, test its opposite and arrive at the best packaging, advertising copy and pricing to inspire existing and new customers.

How does a company improve upon the research trinity of agility, automation and speed?

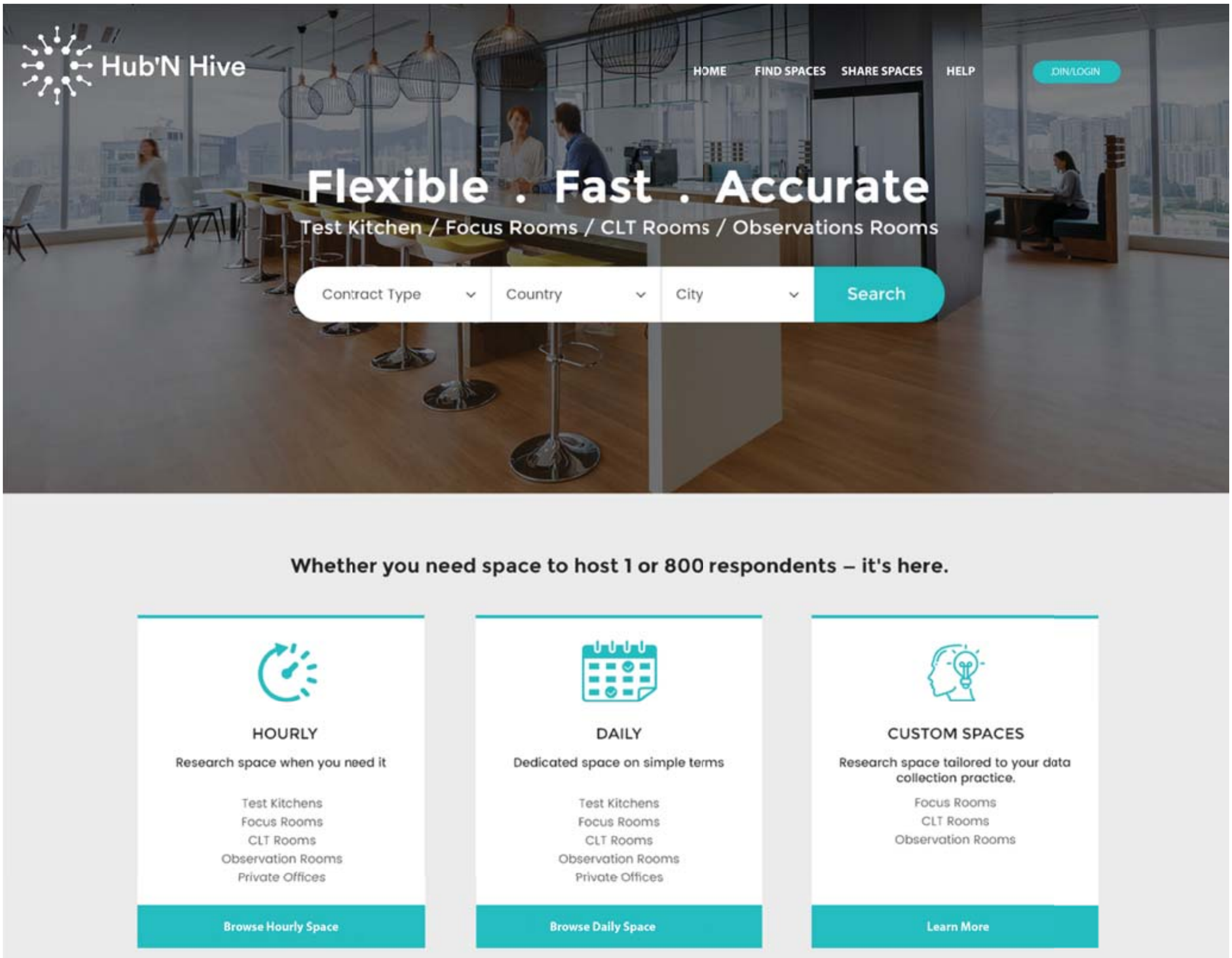
In May, Toluna will launch a new suite of solutions designed by clients to meet their specific needs. Features and benefits will include:

- **Agile research and ease of use:** Our methodology-embedded templates will seamlessly integrate quant and qual or allow clients to upload their own existing templates.
- **Collaboration:** Global teams and companies will share research results across campaigns to minimize duplication.
- **Data flexibility:** Data can be merged and exported from multiple projects to a single platform.
- **Insights with interactive displays**: The real-time insights Toluna is known for will be presented in flexible, interactive dashboards.
- **Quality**: From sample to results, the suite will leverage industry best practices to ensure data and research quality.

Programmed into all Toluna innovations, the new suite also shares award-winning methodologies created and honed by sister company Harris Interactive Europe. A full-service digital research consultancy, Harris makes complex decisions easier with actionable consumer insights that keep clients at the forefront of their industries.

Technology is only as good as the engine that powers it. The new solution suite is driven by TolunaInfluencers, our global panel community that is 30 million members strong. The breadth and depth of our panel community enables businesses, agencies and researchers to make informed decisions, uncover new opportunities, speed products to market and answer essential questions that impact bottom lines. New, dynamic profiling capabilities enable researchers to access such specific and hard-to-reach audiences as Millennials or doctors or new car buyers.

www.tolunacorporate.com



FACTS 'N FIGURES

As the market research industry adopts new technologies to improve data capture and analysis, one thing is certain: the prevalence of cloud computing will continue to rise as facility owners, field researchers and service companies embrace SaaS and marketplace service providers that offer real-time access to on-demand tools to create additional company-wide value.

With new platforms in streaming and social media shifting attention away from traditional data gathering practices, powerful creative tools have democratized the way consumers share their opinions. These tools provide comfort and safety where users can express their own unique voice free of judgment. This shift in consumer behavior has given unprecedented insight into the personal lives of respondents. With vast archives of self-produced content and with the shift in content consumption behavior, new opportunities are emerging, forcing businesses to rethink how and where they access consumer communities for new ideas.

The rise of the sharing economy and cloud computing are pushing researchers to select shorter term, flexible facility space options, and facility owners are finding ways to adjust to the ever-changing landscape of opportunities and challenges. These business requirements force facility owners to rethink how they deliver their real estate. Traditional lease agreements can't solve the flexible requirements of today's field insight professionals.

Hub'N Hive, a new space rental marketplace, is transforming how insights community professionals are finding and booking facilities to conduct studies. As focus group facility owners battle rising costs, facility managers have an opportunity to evolve their strategies to scale and manage their properties. Hub'N Hive has rolled out its facility management platform designed specifically for insight experts and remote field data collection teams to connect with facility operators and private businesses that have space to share. Facility operators can take advantage of customized listing tools to communicate directly with research professionals looking for space to book. Perfect for facility operators of all sizes, Hub'N Hive streamlines back-office activities including listing, marketing and booking space online.

www.factsnfiguresinc.com

Sibyl Surveys by Signet Research is the CX and survey software platform we've been waiting for.

Sibyl
by Signet Research

Until recently, the options available to researchers have been less than ideal. Free or lower-end, "simple survey" tools just don't have the functionality necessary for most objectives. On the other end of the spectrum are large, legacy enterprise tools with underwhelming customer service – not to mention enormous licensing fees. Either way, when it comes time to set up and launch your campaigns, you're on your own.

Enter Sibyl Surveys by Signet Research, a 50-year-old full-service market research company that has developed a survey software and CX monitoring platform with an intuitive UX and ease of use reminiscent of less evolved, "simian" survey platforms, paired with the advanced survey logic and reporting functionality needed to serve a full-service professional research company.

Additionally, when you license Sibyl you're not just getting access to a survey platform. In essence, you're licensing an extension to your internal research department. Signet's staff is available for everything from best practice advice to full survey design, fielding, reporting and third-party independently validated research studies. They can help set up your ongoing CX tracking campaigns, program complex surveys and even take tasks that you may not have the internal bandwidth to handle off your hands completely. They're also extremely responsive to special programming requests and custom integrations with the rest of your tech stack. This allows for a flexible in-house/third-party hybrid solution to your research needs.

Pricing of the Sibyl platform is based solely on usage (number of survey responses). All functionality is included in the platform so there are no extra fees for the number of login accounts needed or upcharges for more advanced analysis functions like crosstabs and stat testing. Customer service is handled by Signet Research staff directly so there are no offshore phone banks or ticketing systems to deal with. With Sibyl, you're assigned an in-house account manager and a researcher.

The result is an affordable, easy-to-use, full survey logic platform serviced by research professionals with an active interest in helping you achieve your goals and the expertise (and staffing) to back you up when you need it.

Reach out for a demo at byron@signetresearch.com or 201-945-6903 x23.

sibylsurveys.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.

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 accelerating analysis by effectively managing a multitude of data using Glide Central®, our online qualitative project management and video curation platform.

Civicom offers the Civicom ThoughtLight™ mobile insights app for collecting in-the-moment insights and See Me Navigate™, a qualitative solution for analyzing app and website usability.

Civicom offers CCam™ Focus, a portable recording and streaming solution for live, in-person focus groups, a natural extension of our IDI and focus group facilitation services worldwide.

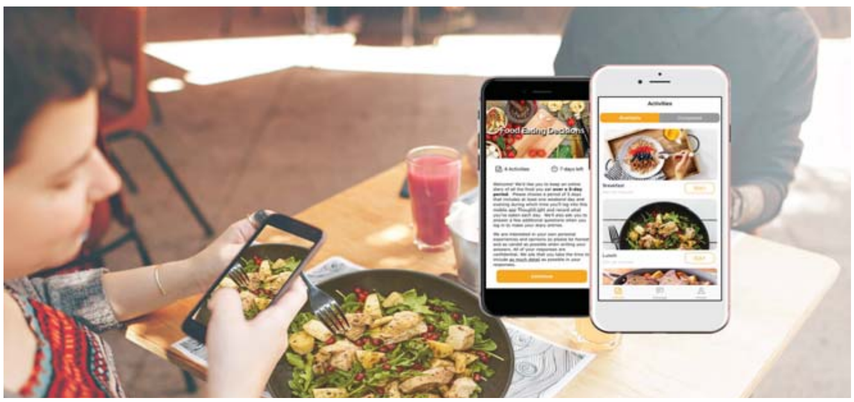
Civicom operates in over 96 countries and includes translation and transcription services (TranscriptionWing™) plus respondent recruiting through CiviSelect™. We are a Strategic Alliance Partner with Schlesinger Group.

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

Your Project Success Is Our Number One Priority.

CivicomMRS.com

Bringing Insights to Light!



Civicom ThoughtLight® is a qualitative mobile app for collecting richer in-the-moment insights. It is utilized for patient journeys, audio/video diaries and shop-alongs – perfect for research on-the-go.

ThoughtLight® can accommodate multiple respondents for studies with varying lengths. You can capture images, audio, video and text responses and consolidate these data through a robust set of administrative tools.

ThoughtLight® has four valuable features: GEO location, GEO fencing, GEO triggering and offline access.

GEO location allows you to observe and capture the respondent's location to verify credibility, quality and authenticity.

GEO fencing allows you to narrow down activities based on specific locations through a virtual barrier to prevent your respondent from completing tasks in another location.

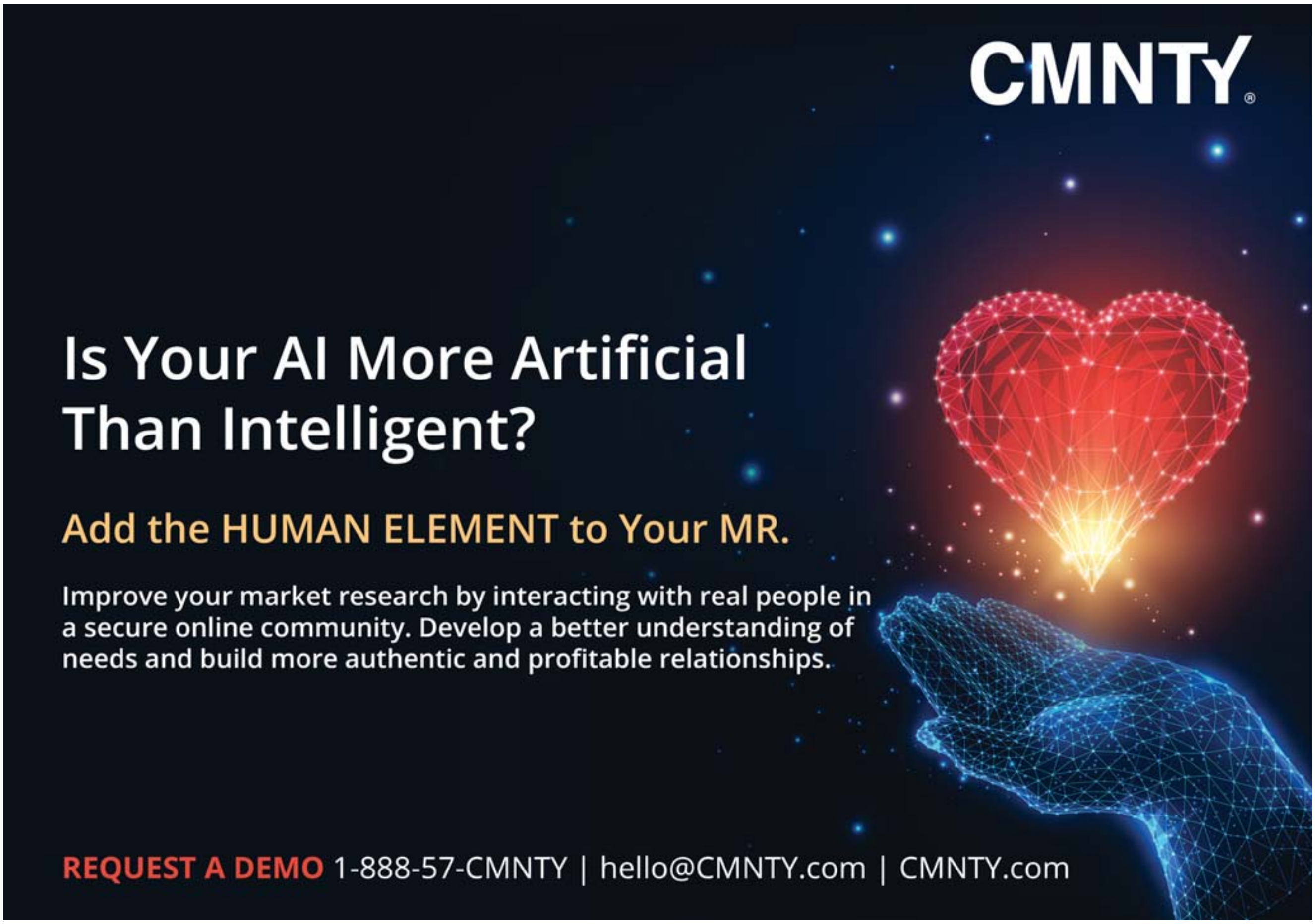
GEO triggering allows you to gather authentic insights by triggering certain activities to start or end based on your respondent's location with the help of GPS positioning.

Offline access allows respondents to access research questions from remote locations without data connectivity once it is loaded to their device. Respondents can easily complete tasks and view their answers uploaded once an internet connection is available.

A dedicated support team will be available to assist you and your respondents throughout the duration of the whole study. We help with the project setup from user registration, data delivery and respondent recruitment.

Contact us today for more information or to get a project quote.

inquire@CivicomMRS.com
www.civicommrs.com/mobile-insights-app/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11 TOP MOCK JURY COMPANIES

A mock jury can be a valuable resource for companies considering litigation or for lawyers looking to improve their argument. These research groups help to identify the strengths and weaknesses in a case and its elements, and help lawyers understand how a jury will respond.

The following companies provide mock jury research to meet your litigation research needs. By recruiting representative jurors and providing top-tier facilities, these companies will make your research process a seamless experience.

quirks.com/articles/2020/20200344.aspx

20|20

Research, Uncomplicated.

20 | 20 Research

Founded 1986 | 167 employees
Kathryn Harlan, CEO, 20|20 Facilities

As one of the industry's leading providers of in-person research facilities, 20|20 has hosted hundreds of mock trials across our locations in Miami, Charlotte, N.C., and Nashville, Tenn. Our tenured team understands the unique requirements for this type of project and we have everything you need for a seamless experience – including spaces for large groups and smaller breakouts, the right equipment for your audiovisual needs and on-site catering to keep you and your participants fueled and fo-

cused. Speaking of those participants, we have our own large and growing panel for each city, along with high-touch recruiting services to ensure you get a representative and engaged sample jury.

Phone 1-800-737-2020
www.2020research.com

Adler Weiner Research

Founded 1989 | 75 employees
Michael Willens, Director and Partner

Adler Weiner Research has the ideal facilities for your Los Angeles or Orange County, Calif., mock jury research needs. Both facilities offer a large double room that can easily accommodate 40 or more jurors with a variety

of setups for presentations and easy breakout into conference rooms. All of our spaces have one-way mirrors and luxury client backrooms for your legal team. Our outstanding client service combined with our expertise in recruiting jury studies will make your litigation research a seamless experience. Our audiovisual services include all the equipment you could need as well as videography and in-house videostreaming.

Phone 1-310-440-2330 Los Angeles;
1-949-870-4200 Orange County
www.adlerweiner.com

Concepts in Focus
Your Research Design Experts

Concepts in Focus

Founded 2000 | 20 employees
Mary Pat Julias, Owner

Concepts in Focus has over 20 years of experience conducting mock juries utilizing our trained staff as well as hired consultants. Our impeccable in-house recruiting services ensure all guidelines required for potential jurors are followed, including but not limited to registered voters or valid driver licensees. With over 6,000 sq. ft., our facility can accommodate up to 30 potentials jurors. The facility layout includes three breakout rooms with private viewing and video/audio monitoring, as well as recording of deliberations and follow-up focus groups. Our highly trained staff provides immediate tabulation of all balloting summaries, witness and issue evaluations and any other requested data. Contact us today for a free consultation!

Phone 1-904-264-5578, 1-800-685-7424
www.conceptsinfocus.com

Copley Focus Centers

Founded 1998 | 10 employees
Frank Amelia, Partner

Copley Focus Centers became the largest facility in downtown Boston by offering a unique experience focusing on strong recruiting and nurturing our relationships with clients. With our fourth expansion and renovation complete, we now offer a room that is 17x33, allowing theater-style seating for up to 50 participants. As Boston's leader in qualitative research, we listen carefully to our client's needs and deliver accordingly, gathering feedback and processing criticism constructively, guaranteeing we only improve. We know what you're looking for and the value of your research.

Phone 1-617-421-4444
www.copleyfocus.com

Creative Consumer Research

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

Creative Consumer Research (CCR) is a leading market research and consumer insights firm, providing accurate and actionable information to develop strategic solutions. Among our wide breadth of research services, we also provide mock jury services for law firms and mediators looking to test and prepare for upcoming trial work. Whether your focus is in our home state of Texas or elsewhere in the U.S., CCR can scout potential jurors and host your mock juries in an appropriate setting. Our resources allow us to thoroughly conduct studies quickly and efficiently – no matter the size or scope. Maximize your business with the CCR market research and consumer insights team.

Phone 1-281-240-9646
www.ccrsurveys.com

End to End User Research

Founded 2017 | 12 employees
Christy Harper, Managing Partner and
Monica Snideman, Managing Partner

Enjoy state-of-the-art recording, live streaming and comfortable observation areas in your choice of three large research rooms at End to End User Research (E2E). Each E2E room offers a large TV/monitor display, one-way viewing mirror for observers and magnetic glass white boards. Conveniently located minutes from IAH airport in Houston, Texas, E2E is the ideal host for your mock jury trial research. With easy access to Houston's large and diverse population, E2E will recruit excellent research participants who match your location or demographic requirements. Experience first-class customer service as we help with all your jury research needs from End to End!

Phone 1-281-741-9496
www.endtoenduserresearch.com

National Field & Focus Inc.

Founded 1990
Vinny Stolo, Director of Operations

Recruiting representative jury panels is all about location and National Field & Focus is located in the optimal area from which to pull participants served by the U.S. District Court of Massachusetts. Our extensive database allows us to reach throughout eastern Massachusetts, north and south of Boston and west to Worcester, making us an ideal choice to recruit and host not only federal panels but also those for Middlesex, Worcester, Suffolk and Norfolk counties. National Field & Focus boasts a presentation room capable of comfortably seating 45 jurors with presentation space for attorneys. In addition, we are able to accommodate panels splitting up into three breakout rooms for deliberations. For remote observers, our in-house video conferencing system allows them to get a live look at the proceedings.

Phone 1-508-370-7788
www.nff-inc.com

The MSR Group

Founded 1994 | 165 employees
Don Beck, Ph.D., CEO

The MSR Group is a full-service research firm offering complete consumer and business-to-business research services. The MSR Group specializes in customer experience management, mock jury studies, brand awareness, advertising and creative testing, along with a wide array of custom quantitative and qualitative project offerings. In addition, we can provide you with groundbreaking verbal and facial recognition AI technology to provide real-time CX feedback to managers on customer and employee sentiment, a powerful new tool to improve coaching, training and ensuring business compliance. Specifications: 150-station TCPA-compliant CATI call center, web and IVR surveys, executive interviews and focus groups.

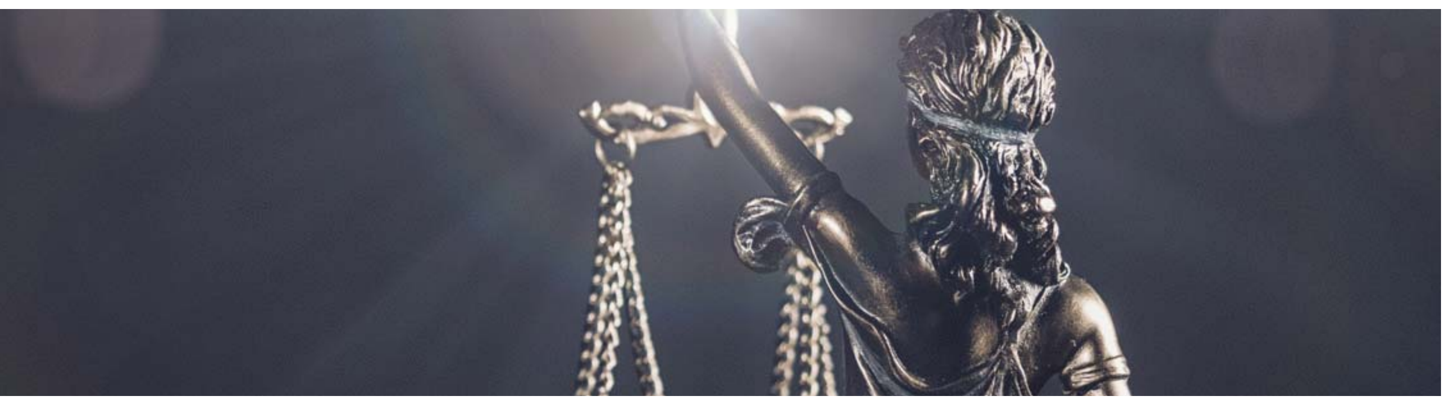
Phone 1-402-392-0755 or 1-800-737-0755
theMSRgroup.com

Precision Research Inc.

Founded 1959 | 25-49 employees
Scott Adleman, President

Precision has been recruiting mock juries for more than 30 years. Our robust database covers the nation, allowing us to recruit to any venue. Beyond high-quality recruiting we have a spacious four-room facility next to O'Hare Airport in Chicago. This unique, spacious facility can comfortably seat 60 jurors with viewing for 25 clients. After presentations, respondents can break out into four deliberation groups. Because we are located near O'Hare, we can more easily draw participants from Chicago's five collar counties: Lake, DuPage, Will, Kendall and McHenry. Of course, we have all the tech you need: ultra-high-speed fiber internet, HD video, projectors, document cameras, etc. For all RFQ's, please e-mail Quotes@preres.com.

Phone 1-847-256-0827
www.preres.com



SCHLESINGER GROUP

Schlesinger Jury Recruitment & Facilities

Founded 1966 | 1,000 employees
Maleica Grant, Director, Client Solutions

We understand the particular needs of jury researchers. Trial and jury consultants trust Schlesinger to help them conduct legal focus groups, mock juries or mock trials to create a strategy or adjust an approach to help them win their legal cases. We help you achieve a final set of 12 well-targeted individuals to participate in your research. We recruit and assemble members of the population who represent an actual jury in terms of gender, age, ethnicity, backgrounds, political opinions, etc. We provide spaces ideal for legal focus groups or mock juries in several of our locations and we have double-size rooms to allow for more complex research or full mock trials. Contact Maleica at Maleica.Grant@SchlesingerGroup.com.

Phone 1-215-564-7300, x118
SchlesingerGroup.com

WAC

Miami
786-364-2272

Ft Lauderdale
945-722-5101

WAC Research

Founded 1997 | 8 employees
Gary Altschul, CEO

When it comes to mock juries, WAC Research is the "Bull" of South Florida. We conduct well over 40 juries per year in our two expansive locations in Fort Lauderdale and Miami. Both locations have three oversized conference rooms with the ability to seat up to 48 jurors theater-style. Our two diverse locations give you the ability to select your juries from any groups represented in Florida. In addition, we provide videostreaming and conferencing, recruiters and staff experienced with mock juries, two-way mirrors, client lounges and catering for clients and jurors. When it comes to putting together mock juries, experience counts! WAC Research is one of the most experienced companies in South Florida, as well as in the U.S.

Phone 1-954-772-5101
www.wacresearch.com

IMMERSE YOURSELF
IN NEW IDEAS AND STRATEGIES!

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Do you know your chickens? A case study in online panel development

Ron Pocs, *Regional Market Research Manager • CNH Industrial*

As a large manufacturing organization, the idea of creating an online panel of B2B customers to efficiently and cost-effectively conduct market research seemed a bit far-fetched. When I first broached the idea among others within the organization, I was told that I don't know my chickens (i.e., this will never happen). Today, the panel has been successfully running for over 3 years with 900+ members. How did it happen?

Worth more than 1,000 words: Using consumer-generated video

Stacy Shaleen, *Market Insights Manager • Cargill*

How do you conduct ethnographies and gather in-use insights when you have limited time and budget? Let consumers take you into their world with their phones. In today's smartphone-run world, everybody can provide a high-quality view into their buying decisions and usage habits. Like traditional ethnographies, the learning goes well beyond the questions asked. Without a bunch of strangers in their barn, consumers were comfortable showing all their routines and challenges.

Visual semiotics: Shouting without words – QRCA curated session

Michael Sack, *Founder and Owner • Brand Kinetics LLC*
Todd Trautz, *Chief Innovation and Solutions Officer • Maru/Matchbox*

The privacy paradox

Reg Baker, *North American Regional Ambassador • ESOMAR*

Cutting-edge research in associations and nonprofits: Hitting the goals and making a "profit" in a nonprofit world

John Laprise, *Market Research Manager • Radiological Society of North America*
Lisa Herceg, *Director, Business Insights, Research • National Association of REALTORS*
Randa Ulankiewicz, *Market Research Analyst • Society of Actuaries*

Evolving CX measurement at Progressive

Mona Stronsick, *Director of Market Research • Progressive Insurance*
Mike Franke, *Senior Market Research Analyst • Progressive Insurance*

Closing the experience gap: Diagnosing your gap and identifying the best strategy to close it

Rhonda Hiatt, *Chief Strategy Officer, USA • CLear M&C Saatchi*

Purdue University Masterbrand: Finding the essence

David Moore, *Market Research Consultant • Purdue University*
Keri Downs, *Consultant • Brandtrust*
Ethan Braden, *VP of Marketing and Media • Purdue University*

Neuro-physiological techniques for CX and UX research

Jose Gonzalez, *Manager, Consumer Insights • Verizon*
Devin Harold, *UX Research Manager • Verizon*
Claire Kearney-Volpe, *UX Research Consultant • Verizon*

Zero to sixty (concepts) in the blink of an eye: How the sausage is made

Karen Kraft, *Senior Consumer Insights Manager • Johnsonville*
Katherine Figatner, *Senior Vice President/ Partner • C+R Research*
Monica Grant, *Innovation Process Designer and Facilitator • Ideas To Go*

Segmentation at scale: Combining behavioral analysis and attitudinal insights to win every occasion

Rick Stringer, *Vice President of Customer Solutions • Crayola*

Stars and scars of segmentation: Hacks for success

La Sridhar, *Global Director of Insights and Consumer Excellence • Molson Coors*

Counterintuitive thinking: Reframing research baseline assumptions

Susan Fader, *Insight Navigator • Fader & Associates*

How to leverage research to build meaningful brands

Emmanuel Probst, *SVP, Brand Health Tracking and Adjunct Professor • Ipsos and UCLA*

AI for automated insight generation

Suresh Kumar, *Head of AI Solutions • Palo Alto Research Center (PARC)*

The impact of cultural codes on consumer behavior and brand relevance

Shruti Saini, *Senior Director, Brand Strategy and Insights • Anheuser-Busch*

Beyond customer journey-mapping: Understanding impact of touchpoints

Suresh Kumar, *Business Insights Manager • Pella Corporation*

Rotary International identifies global engagement trends and drivers using cross-disciplinary insights to understand participants' journey

Anja Van Ostrand, *Research and Evaluation Partner • Rotary International*
Michelle Roseborough, *Senior Research and Evaluation Partner • Rotary International*
Amanda Reid, *Manager, Reserch and Evaluation • Rotary International*

Ride the ripples or get soaked: How to capitalize on disruptive trends

Julia Eisenberg, *Vice President, Insights • 20|20 Research*
Lori Georganna, *Senior Director, Consumer Insight and Research • Wyndham Destinations*

Using hybrid methods to supercharge your qual research

Ray Fischer, *Founder and CEO • Aha! Strategic Online Qual Platform*

Accelerating the innovation process from 21 weeks to 21 days with AI-powered prediction

Nikolas Pearmnine, *VP Client Services • Black Swan Data*

ISO the next big trendy ingredient and its impact on product performance – featuring a new study on CBD using quali-quant with social listening

Silvena Milenkova, *Chief Research Officer • BuzzBack Market Research*

Wake up, Tracker, and make yourself useful – It's 2020!

Mary McIlrath, *Senior Vice President/Partner • C+R Research*

Managing online communities to achieve ROI

John Voda, *Senior Market Research and Analysis Manager • AT&T*

AT&T

Learn best practices for managing an online research community, to develop topics for weekly research and to ensure you don't drown in work (since it never ends). Most importantly, learn how to ensure results are noticed by management to ensure your community achieves a ROI (and maintains funding).

Data, analytics and storytelling – perfect together!

Holly Carter, *Director of Product Marketing • Confirmit*

Be more than a forgotten footnote: Improve the activation of research and insights in your organization

Vanessa Roddam, *Manager, Shopper Insights and Analytics • Constellation Brands*

Sometimes large research projects create fantastic looking reports and powerpoint slides but they see disproportionately small adoption within an organization. And outputs from robust research sometimes get overshadowed by one or two statistics from the research instead of illuminating actionable insight. How can we better connect insights to action? And how can even the most complex projects deliver salient, actionable solutions? Keep the research methods robust and make the deliverables more embraceable.

Which one is not like the other? The differences between UX and market research

Cara Woodland, *Market Research Manager • eMoney Advisor*
Evan Eiswerth, *Supervisor, User Experience • eMoney Advisor*

To better inform the digital age, market research and the methodologies have adapted in many ways. A new breed of researcher has also formed out of the digital age to focus on user experience design and user-centric development.
The goal of this session is to help define the similarities and differences between a user experience researcher and market research.

Stop, automate and listen: Demystifying report automation

Benjamin Rietti, *CEO • E-Tabs*

Learn where to focus your media spend

Eva Gott, *Vice President, Research • Savanta*

The generation of responsible shoppers – Does Gen Z put their money where their activism is?

Ally Aleman, *SVP Qualitative Research • MarketCast*
Julie Arbit, *Global SVP, Insights • VICE Media*

Gaining clarity through on-demand behavioral research

Greg Stucky, *Chief Research Officer • InsightsNow*
Sarah Kirkmeyer, *Sr. Director Client Partnerships • InsightsNow*

Behind the curtain: Perspectives from corporate insights leaders

Tyler McMullen, *President and CEO • MarketVision Research*
Becky Shultz, *Vice President, Qualitative • MarketVision Research*

From story to glory

Jeffrey Henning, *Executive International • MRII*

Develop decisive insights with behavioral science

Irina Zilberman, *• Protobrand*
Meg Weltzer, *• Tyson Foods*

The implicit playbook: Develop a competitive advantage by appealing to your consumer's subconscious

Thomas Fandrich, *Co-Founder and Managing Director U.S. • quantilope*

Mind modeling: Identifying Cheez-It's distinctive attributes

Terrae Schroeder, *Head of Insights USA • Kellogg's*
Tim Hoskins, *President • Quester*

Overcoming a crisis: How insights have saved the past decade's most high-profile crisis

Rex Repass, *President • Research America*
Dan McGinn, *CEO • McGinn and Company*

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Hacking life shifts: How AARP has taken a leadership role in partnering with brands in launching innovative insights

Alison Bryant, *Consumer Strategist, Media and Multigenerational Families Expert • AARP*
Lisa Cooper, *Senior Vice President • RTi Research*
Lori Bitter, *CEO • The Business of Aging*

Decoding signal vs. noise: How Microsoft uses proactive insights to stay ahead of the curve

Tanya Pinto, *Director, Customer and Market Research • Microsoft*
Marc Goulet, *Vice President • Russell Research*

Driving change and lessons learned

Chuck Sharp, *CEO • Sharpr*
Mary Colleen Hershey, *Vice President Consumer and Marketplace Insights • Nestlé*

Rapidly enabling breakthrough ideas for Barilla while building capability

Kit Burton, *Brand Manager • Barilla*
Heather Christman, *Director, Lean Growth • The Garage Group*

How much enjoyment can an indulgent snack really bring when life gets in the way?

Keren Novack, *VP of Client Services • Curion*
Lisa Saxon Reed, *Director, Global Sensory • Mars Wrigley*

We are what we...feed our kids? The what, where and why of today's grocery purchases

Bess Devenow, *Director of Marketing • ProdegeMR*
Maureen Lawer, *Senior Director, Data Solutions • ProdegeMR*

Clean label: "Better for you" consumer trends and generational differences

Antje Sardo, *Senior Research Analyst • GutCheck*

Tapping organizational change to increase market research relevance

Monika Wingate, *CEO and Co-Founder • Digsite*
Heather Vossler, *Director of Insights and Innovation • Hormel Foods*

Many organizations are seeking out agile approaches as they adjust to the accelerating pace of innovation. As a result, insights teams are shifting to agile research methods that allow them to simultaneously build, test and learn. In this presentation, Hormel Director of Insights and Innovation Heather Vossler and Digsite CEO Monika Wingate will discuss how combining the right tool with an agile research approach enables teams to quickly get in-context learning and deep consumer insights.

Better behavior predictions through better behavior testing

Anne Stephenson, *Partner • Explorer Research*

7 steps for building a scalable DIY research program that influences business growth

Morgan Molnar, *Head of Product Marketing and Insights • SurveyMonkey*

Everyone wants to be heard, no one wants to be studied! How brands are leveraging conversational methods for deeper experiential insights

Matt Kleinschmit, *Founder and CEO • Reach3 Insights*
Dara St. Louis, *SVP and Founding Partner • Reach3 Insights*

One app instead of the lab: Measuring CX + UX on mobile at scale is a new reality

Dmitry Gaiduk, *CEO • UXReality by CoolTool*

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Separate registration required, see the website for details.

TheQuirksEvent.com

How to help respondents talk about potentially embarrassing topics

| By Steve Hudson

snapshot

With empathy and the right approach, qualitative research can help our clients and enrich our understanding of what it means to be human.

Years ago when I was a newbie qualitative researcher, I was asked to conduct individual interviews for an adult diaper brand. As part of the discussion guide, the mostly-older respondents were asked to try the new diaper designs on over their pants in front of a two-way mirror full of clients and then talk about how they felt. I can still picture some of them – the stylish African American woman and her stoic expression; the retired accountant in corduroy pants getting flustered with the sticky attachments. Looking back, I cringe with my own embarrassment when I think of how humiliating the experience must have been for them.

From diarrhea and credit card debt to impotence and wart removal, uncomfortable or embarrassing topics are a fact of life for consumers – and for marketers who rely on honest insights to create and promote meaningful products and services for them. For qualitative researchers, these projects can either feel like navigating through minefields or, if run well, be both enlightening and kind of liberating for respondents and moderator alike.

How can qualitative researchers help research respondents open up without leaving them feeling shamed or worse? Here are six tips I've picked up over the years from my own experience and the advice of fellow qualitative researchers:

- **Tell respondents the purpose of the study**, both in the recruiting stage and at the outset of the interview or group. Patients with a specific condition, for example, may be more motivated to participate if they know that the research will be used to help others like themselves.
- **One-on-one interviews are often ideal.** It's difficult enough having to open up to one person about dealing with premature ejaculation or crushing financial debt, let alone a room full of strangers. For usage tests such as the diaper study mentioned above, use online diaries so respondents can try out products in the privacy of their home and report back. For group discussions, anonymous online discussion boards can allow for a wealth of feedback you might never get from in-person research.
- **In-person focus groups on sensitive topics can provide an abundance of insights** as long as all respondents are recruited to the same specs and assured of anonymity. Individuals who have been largely suffering alone may be delighted to be in the company of others in similar situations. Once the floodgates open, the group often almost runs itself with a few nudges here and there from the moderator to steer the conversation through the guide. At the start of the group, let respondents know that they may find themselves interested in continuing the conversation with fellow respondents after the group is over and if so, they may share their information with others if they wish but should feel no pressure to do so. This can create a self-fulfilling prophecy where participants feel more invested in each other and the topic.
- **Spend a little more time than usual in the introduction stage in order to build**

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trust and openness. You may want to reveal some information about yourself – where you're from, your living situation and why you find it meaningful to talk with people like them – in order to prompt the same openness from them.

- **Normalize!** We've all heard the pharmaceutical ads that let us know that one-in-four people live with this or that condition. Reassure respondents that they are not unusual and that many others share their same situation or condition.
- **Strike a matter-of-fact tone**. Some of the topics discussed may cover very sad or depressing territory. In such case, the best advice I've found is to acknowledge what was said, show empathy and continue on with the discussion.

In covering sensitive topics, you may come across respondents in real emotional distress. The best advice I've heard is to work with clients in advance to develop a distress protocol. This may include offering to call a respondent's friend or family member for them, providing contact numbers for support services or having a local licensed therapist available on call.

B2B projects can present another type of roadblock when it comes to getting respondents to be candid. The owner of a local landscaping company in a highly competitive market may be rightly guarded about revealing how much she spends on weed killer each year. Rather, ask business owners or managers about the trends they see in in their industry and market. Inevitably they'll end up talking about their own experience.

It's a privilege

Ultimately, it's a privilege to have research respondents let us into parts of their lives or businesses that they probably don't discuss even with close friends. Sometimes such projects give us much more than facts from a discussion guide – they give us a unique window into the human condition. Like the time I moderated a hospice care group and listened to a veteran with kidney failure talking about coming to terms with the end of his life. Or the beer group in which an electrician explained that though he loved his family, home life was much more challenging than work life. Or the feminine products group moderated by a fellow quallie in which an older woman opened up about an affair that she had never been able to talk about with others before. With empathy and the right approach, we can uncover truths that build better solutions for our clients while enriching our own understanding of what it means to be human.

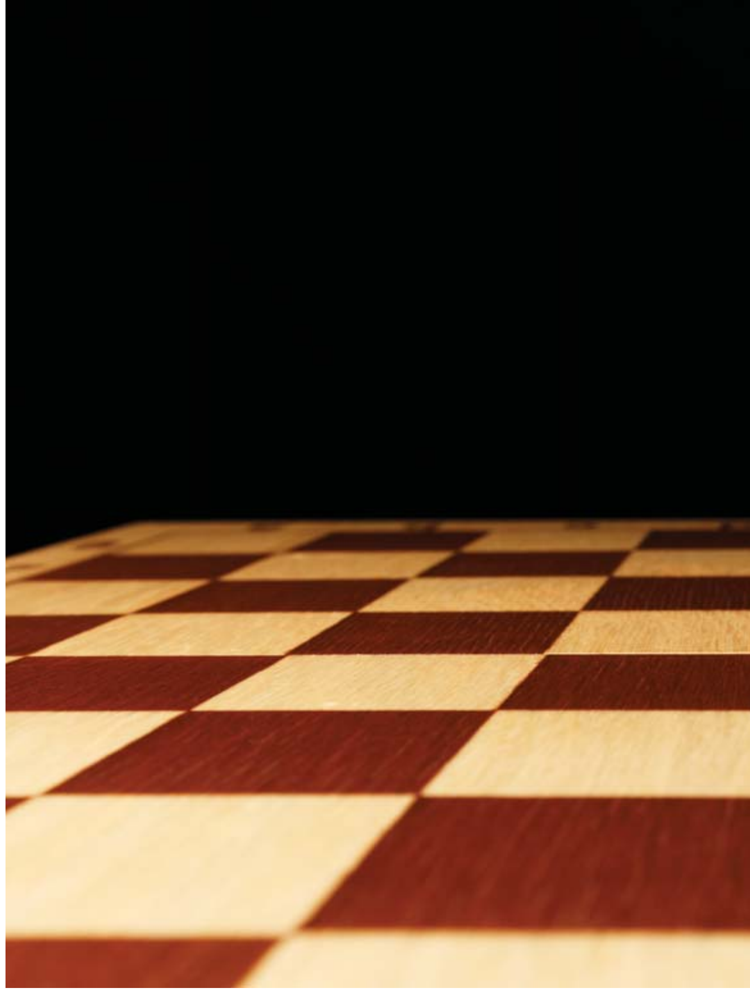
Steve Hudson is an independent moderator and president of Let's Talk Research Inc., Chicago. He can be reached at steve@letstalkresearch.com.

••• b2b research

Verbal instructions

Rethinking win-loss to increase sales

| By Jim Kraus



snapshot

Jim Kraus oulines how to move the traditional sales win-loss program to a strategic win-loss program.

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Traditional win-loss programs continue to provide significant value to organizations that sell to other businesses (B2B) and represent an untapped opportunity to improve win rates for those that have yet to implement such a program. However, there are three distinct ways that win-loss efforts can deliver even more value:

First, by **implementing a strategic win-loss program** that involves interviews with recent prospects but takes a broader and more robust view that focuses on an organization's entire value proposition and ability to compete for business rather than focusing on the performance of sales professionals alone.

Second, by **adding an internal and past-deal perspective** to these programs to better pinpoint specific actions an organization can take to improve win rates and prioritize sales opportunities that have a better chance of closing.

Third, by **enhancing efforts to activate win-loss insights** to bolster idea-sharing and accountability across the organization that leads to improved sales performance (rather than just "reporting out results").

Not coincidentally, each of these opportunities is focused on improving the ROI of win-loss programs by creating a tighter linkage between learnings, actions and, ultimately, performance.

Three battlegrounds

Undoubtedly, there is work to be done for any organization that wants to build brand awareness and consideration for its products and services. However, once you are in the consideration set along with other companies vying for the same opportunity, closing new business fundamentally comes down to the three battlegrounds shown in Figure 1.

Companies that are able to close more business excel in each of these areas and get ongoing feedback from prospects that tells them

Figure 1

Figure 2

exactly how they're doing and where they can improve.

A strategic win-loss program involves ongoing interviews with decision-makers at prospect companies from a broad sample of won and lost deals. Unlike sales win-loss (Figure 2), interviews are focused on an organization's entire value proposition to determine how well it's performing across all key battlegrounds in the prospect's purchase journey.

By collecting thorough and objective input from prospects over time, a strategic win-loss program provides answers to key questions that benefit multiple stakeholders across the organization, including:

Sales/distribution – provides direct feedback on how sales and support teams can sharpen their performance throughout the sales process (building rapport, identifying needs, offering value, overcoming objections, closing the sale) to increase win rates.

Product development and pricing – informs how well a company's products and services stack up versus key competitors at the moment of truth (when the purchase decision is made). Which features or benefits are helping you win new business? Which are putting you at a competitive disadvantage? Are you price-competitive?

Marketing – helps determine if your value proposition and messages are breaking through and whether they are relevant and differentiating to qualified prospects. Win-loss interviews also help the marketing team better understand the buying process from the prospect's lens and consequently provide insights about when and how to best engage with them during their purchase journey.

Competitive intelligence – gain on-the-street intelligence about competitor sales tactics and pricing that is often hard to uncover without speaking to prospects interacting with these companies directly. This type of information is invaluable when developing competitor-specific strategies to optimize sales.

Senior leadership – provides an ongoing look into whether your organization's offerings are winning in the market, what key competitors are doing and their results and where the organization has competitive advantages and disadvantages across its overall value proposition.

The other distinct advantage of a strategic win-loss program is that it focuses on distilling and communicating these insights across the organization so there is one "single source of the truth" that all stakeholders can buy into and action-plan around. It also helps galvanize cross-functional teams that all ultimately contribute to sales success (and failure).

What types of companies can benefit most from a strategic win-loss program? Companies that sell to other businesses where new opportunities often involve:

- a highly competitive bid process;
- a more substantial investment required from the customer;
- multiple decision influencers involved in the purchase decision; and
- differences in what competitors offer, their value proposition and how they go to market.

Highly dynamic industries can take particular advantage of strategic win-loss because an up-to-date view of what's happening in the trenches, where deals are taking place, is mandatory to keep your competitive edge.

The ultimate report card

So, can a strategic win-loss program focused on interviewing qualified prospects provide useful insights to improve win rates? Absolutely! We often refer to this as the external foundation component of win-loss since you're interviewing prospects outside of your company and there is no better judge of how you stack up versus the competition than a prospect who is comparing your offer to that of other competing firms when they are in a position to make a purchase – it is the ultimate report card!

However, there are two additional components to strategic win-loss programs – sales and support team interviews and new opportunity deal analysis – that many companies overlook (Figure 3). Each, by itself, has definitive value. Together, they represent a formidable and integrated approach that better pinpoints specific actions to improve win rates and predict opportunities that have the best chance of resulting in a sale.

Let's discuss each of these two additional components in turn.

Sales and support team interviews: linkage to external market

The purpose of periodic interviews with your sales and new business support teams is twofold:

The first, and primary purpose, is to **better understand cause-and-effect linkages between what is going on in the external market (with prospects) and what may be happening internally that is contributing to this effect**. Too often, when only prospect interviews are conducted, different issues are identified that impede a sale but there is no clear linkage to what might have caused that result internally, within an organization. Consequently, the action that can be taken to improve a particular outcome isn't identified or is done so with less confidence as there are other plausible reasons that may or may not also play a role. Here's a couple of real-life examples from win-loss programs KS&R has worked on:

Figure 3

A technology company that sells enterprise business applications to other businesses was losing new deal opportunities because its competition was delivering bids two to four times faster than it was. These delays reflected poorly on the organization in terms of its responsiveness and many times resulted in bids that were delivered AFTER a final decision had already been made. For months this information was passed along to management with no action taken to reduce bid times because no one was completely sure what the root cause was. Possible reasons included too many information requirements to produce a price quote quickly, manual/inefficient processes, lengthy/cumbersome exception processing and so on. Only after conducting internal interviews with sales and support teams was the true root cause identified and it had more to do with chronic turnover of new business development team staff than inefficient processes. This turnover resulted in an overreliance on support team members who were not trained or seasoned enough to handle certain proposal requirements efficiently which, in turn, slowed down bids and led to a backlog that was hard to catch up with. Only after this root cause was identified was the organization able to take specific actions to remedy it.

A second example involved a telecom company that provides network equipment and support services to other businesses. Through the win-loss interviews, the company (correctly) determined it was losing new opportunities because prospects didn't feel like their business was being valued enough. Competitors were giving these prospects the feeling that their business mattered and provided white-glove service throughout the sales process – asking thoughtful questions, demonstrating an understanding of their business, being responsive throughout the bid process, etc. It was only after conducting internal interviews with the company's sales teams that we learned of aggressive new customer acquisition sales quotas that had been put in place over the past year that put significant pressure on them to close as many deals as possible each and every month. This had the undesirable effect of reducing the amount of time they could spend with any one prospect and sales professionals told us about shortcuts they were forced to take that hurt their ability to develop relationships with new prospects. Once this information was funneled to management, remedies were identified and performance improved.

The second reason to conduct interviews with sales and support teams is to *get frontline suggestions on ways to improve win rates*. It's often the people in the trenches day-in and day-out who are best equipped

to identify why their organization is winning or losing business. These interviews, particularly if conducted by an outside party, give them a voice to express their views honestly and fully and to offer suggestions for improvements that otherwise may not be as apparent to management and other back-office functions. In addition, we often identify approaches and behaviors that ultimately feed into best practices that are more widely shared across the organization.

In terms of timing and process, there are different approaches to conducting sales and support team discussions including ongoing, periodic or even one-time interviewing depending on the size and complexity of the organization, sales territories, product/service portfolio and other factors. The important point is to include an internal perspective in your strategic win-loss program so you can make cause-and-effect linkages that lead to improved action planning.

New opportunity deal analysis: predict future outcomes

New opportunity deal analysis (NODA) is the final component and also one that most companies don't do as frequently, if at all. Unlike the first two components, NODA involves analyzing data from past opportunities to identify predictors of wins and losses. As the famous saying goes, "Those who cannot learn from the past are doomed to repeat it."

Using advanced analytical methods (e.g., AI, machine learning or regression-based algorithms), NODA looks at different factors that might be present in any given opportunity to identify which characteristics are more likely to result in a win or a loss. Typically, the types of data we look at to identify these predictors include things that are commonly available in a company's CRM or related systems such as:

- prospect's business need for the product or service
- type of product or service including presence or absence of certain features/functions
- number of days at each stage of the opportunity lifetime
- size of the opportunity (in dollars)
- pricing details/specifics, e.g., pricing unit, use of discounts, etc.
- geography
- competitive brands being considered (if known)
- who, if anyone, is an incumbent provider
- number of decision makers (or even the different roles involved in the decision)
- sales approach – any information on people, processes and marketing/sales assets used
- sales professional characteristics, e.g., amount of time on an account, experience with the product/service, number of concurrent opportunities open with the client, etc.

Any data that is available on a given opportunity – whether internal or appended external data – can be used to help determine which factor or combination of factors is most likely to result in a win or a loss. Once identified, predictive algorithms can be developed and used to:

Develop "red alert" flags when new opportunities come in that have a higher chance of closing. By doing so, a company can create processes to quickly get on top of those opportunities that have the best chance of becoming a sale.

Manage sales resources to prioritize new opportunities that have a higher chance of closing. If available sales resources are limited, a company can direct its sales force to those opportunities that are the most likely to bear fruit and even deprioritize those that have a lower chance of closing.

Inform pricing strategy and tactics. For example, certain price discounts or premiums might be considered depending on the particular sales objective at that time and whether a given opportunity has a better chance of closing or not.

Develop strategies to remedy conditions that are a key driver of losses. For example:

- If it is determined that losses often involve a particular type of client need, strategies can be developed to help a company better meet these types of needs in the future.
- If losses are occurring more frequently when facing a certain competitor, approaches can be developed to bolster a company's positioning versus that provider.
- If there are inefficiencies in the pipeline, intervention techniques can be applied to reallocate resources and improve the chance of closing future deals.

Unlike the first two win-loss components, deal analytics involves analyzing data a company already has rather than conducting interviews to obtain that information. It is a great addition to any win-loss program because it provides forward-looking insights integrated into the sales pipeline, building on the "why" addressed by the first two components.

What is really driving wins and losses

As mentioned at the start, doing any one of these three win-loss components (win-loss prospect interviews, sales and support team interviews, new opportunity deal analysis) has value and can significantly improve win rates and sales performance. One of the biggest benefits of executing multiple components is it helps develop one "single source of the truth" across the organization. The importance of this benefit cannot be overstated. Rather than anecdotal information being spread across the organization (that is frequently NOT true in all cases), a well-thought-out and multi-component program has the added benefit of identifying what is really driving wins and losses based on multiple inputs that are analyzed holistically.

Which brings us to the second opportunity to improve strategic win-loss programs: by enhancing efforts to activate these insights that ignite idea-sharing and action across the organization.

So, you have a strategic win-loss program or there is discussion about starting one. The types of reporting you're doing or considering likely involve things such as:

- raw data from the interviews – au-

dio files and/or written transcripts of the interviews
- scorecards/snapshots – this is usually a one-to-two-pager that highlights key findings and metrics from one prospect interview (e.g., business need, product/service, deal amount, competitors involved, reason(s) for the win or loss, etc.)
- summary and/or detailed reports – these reports, done periodically (e.g., quarterly, semi-annually or annually), aggregate and summarize findings across a set of interviews so drivers of wins and losses are identified holistically on an ongoing basis

These types of reporting mechanisms are very useful in order to effectively analyze and communicate what is going on. In this regard, they are a fundamental component to any strategic win-loss program. However, they're simply not enough. Why? Because, while they do an adequate job of reporting what's going on, they do an inadequate job of activating these insights so they result in improved win rates and sales.

To truly move the needle on performance, we recommend that each of the following be a core component of any win-loss program:

Win-loss KPIs. As they say, "You get what you inspect, not what you expect" and if there are no targets set and measured on an ongoing basis then there is no way to monitor how well your improvement efforts are going or to ensure they remain one of the key focal points of the organization. KPIs could be as simple as win rates overall and for high-priority segments (e.g., product/service category, geography, customer type, etc.), in addition to other financial measures most companies monitor already (revenue, profitability, etc.).

Online dashboard. Online dashboards that provide (near) real-time information and metrics on wins and losses accomplish two things. First, they provide that one single source of the truth that key stakeholders across the organization can tap into in order to see what's really going on in terms of wins and losses. Second, they help management keep track of progress against KPIs so they can ignite action when, where and how it's needed.

Red-alert sales notifications. These apply predictive algorithms to your ongoing sales pipeline to notify account teams of high-priority deal opportunities that have the best chance of closing. This analysis can also be incorporated into online dashboards to provide an up-to-date view of pipeline health.

Activation workshops. There are different forms and approaches, but activation workshops typically involve getting all key stakeholders in a room and:

-- Communicating key results from win-loss interviews and complementary inputs so there is a mutual understanding about what is actually going on both externally and internally. This is a critically important first step because there are often multiple factors that influence sales performance and it's important that key stakeholders across key functions (sales, marketing, product development, finance, strategy, etc.) all buy into the same set of facts. We often use pre-reads for these sessions so this step can be covered efficiently during the workshop.

-- Brainstorming potential steps to improve performance using different techniques that help bubble up the best ideas. This step involves identifying all the possible approaches to improving a particular situation or circumstance that is impeding sales performance.

-- Selecting one (or a few) approaches to improve performance. This typically involves preliminary voting to identify a handful of high-potential action steps based on all of the initial ideas identified. As needed, there is further discussion to identify a manageable number to investigate further.

-- Next-steps planning. The final step is to identify action steps for each of the top ideas and assign individuals to move them forward. Future meetings are scheduled to report on progress and ensure key linkages are being made.

Once the ideas have been fully vetted, a business case is developed (as needed) and those selected are implemented with alignment to win-loss KPIs to measure and monitor progress.

-- Sales tools. These typically involve sales assets that are developed based on win-loss interviews and complementary inputs. For example, a "sales battle card" is developed that arms an organization's salesforce with information for how to effectively compete against a particular competitor. These cards will include things such as common sales tactics used by a particular competitor, how they position themselves, pricing and discount tendencies, etc. They also provide specific recommendations to help prospects see the tangible and differentiating value of your product or service.

-- Sales training. One opportunity often missed is to incorporate learnings from win-loss programs into an organization's sales training. These insights are particularly useful to sales professionals just entering the company because they provide a crash course from the voice of the prospect on how to win (and lose) their business.

None of these outputs and ways of using win-loss insights is mandatory but each should be considered as we have found they significantly improve the ROI of these programs.

Eight best practices

At our firm, we are pro-win-loss because there are few research studies that can directly improve sales performance as much, and as quickly, as these programs can. Based on our experience partnering with clients in different industries and B2B environments, we offer the following eight best practices:

1. **Position win-loss as a sales improvement program (not "market research").** Good market research is the underpinning of a strong win-loss program but these are investments focused on improving win rates and sales. Thinking about them in any other way misses the point.
2. **Cultivate an internal champion (sales, marketing, product, etc.).** Win-loss provides valuable insights

across a number of key functions in the organization which are usually realized over time. Having an internal champion to promote the program and get buy-in helps others see that value.

3. **Start small, prove, expand.** Pilots are critical for internal buy-in and success. Starting small could include focusing win-loss on a particular product/service, a particular geography or any other segment of the market.
4. **If you can only do one component, prioritize prospect win-loss interviews initially.** Insights from these interviews provide the critical foundation of any win-loss program.
5. **Pay attention to the real deliverable: identifying specific actions to improve win rates.** Go beyond just reporting results and incorporate KPIs, dashboards, workshops, sales tools and sales training protocols.
6. **Integrate results with ongoing internal reporting tools and business cadence.** Take advantage of existing reporting mechanisms to incorporate win-loss insights and KPIs so they become part of how your organization manages sales.
7. **Focus the program on encourage-and-enhance, not punish-and-penalize.** Win-loss insights should be used to make the organization smarter so it can perform at a more optimal level. It should not be used to call out sales professionals or any other function that enables and supports the sales process.
8. **Engage an outside firm that specializes in strategic win-loss to improve the program's objectivity and credibility.** There are a few key benefits in working with an experienced partner: prospect and internal interviewees are more likely to open up to an objective third-party and provide candid feedback, including information on competitors; it eliminates biases sales professionals may have doing the interviews (particularly important since the sales process often contributes to wins and losses); professional interviewers – skilled at asking questions, listening to answers and probing further – will dig deeper to identify the real causes of wins and losses; an outsider lens is often the very view necessary to break out of old habits and legacy rationale; external support usually results in a more systematic and reliable win-loss program over time (e.g., ongoing data collection, regular reporting, consistency, etc.).

Tangible enhancements

A well-executed strategic win-loss program with deliverables that trigger tangible enhancements to a company's value proposition and sales performance will improve win rates, it's that simple. If your company sells to other businesses in a competitive environment, consider how one or more components of a comprehensive strategic win-loss program can help your organization.

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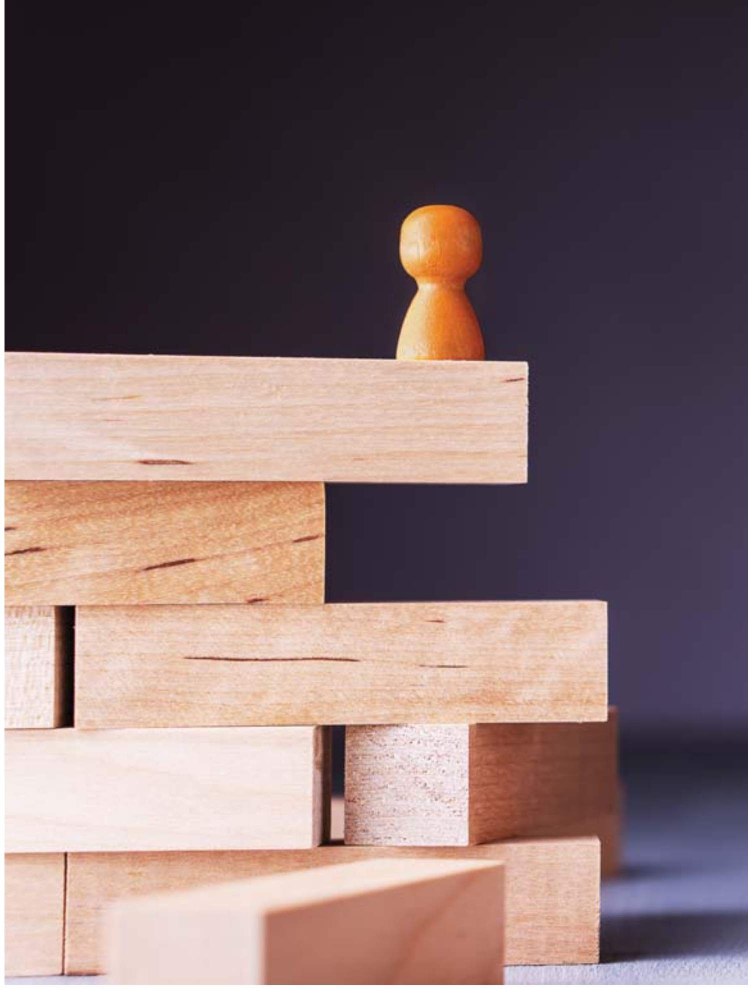
••• b2b research

Not so similar

How B2B research is different from B2C

| By Alan Hale



snapshot

Alan Hale explores B2B vs. B2C research and offers tips for more effective B2B insight-gathering.

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There have been claims that B2B marketing research is really no different than B2C research. While there are some commonalities, our firm wholeheartedly pushes back against this and believes there are far more differences than similarities.

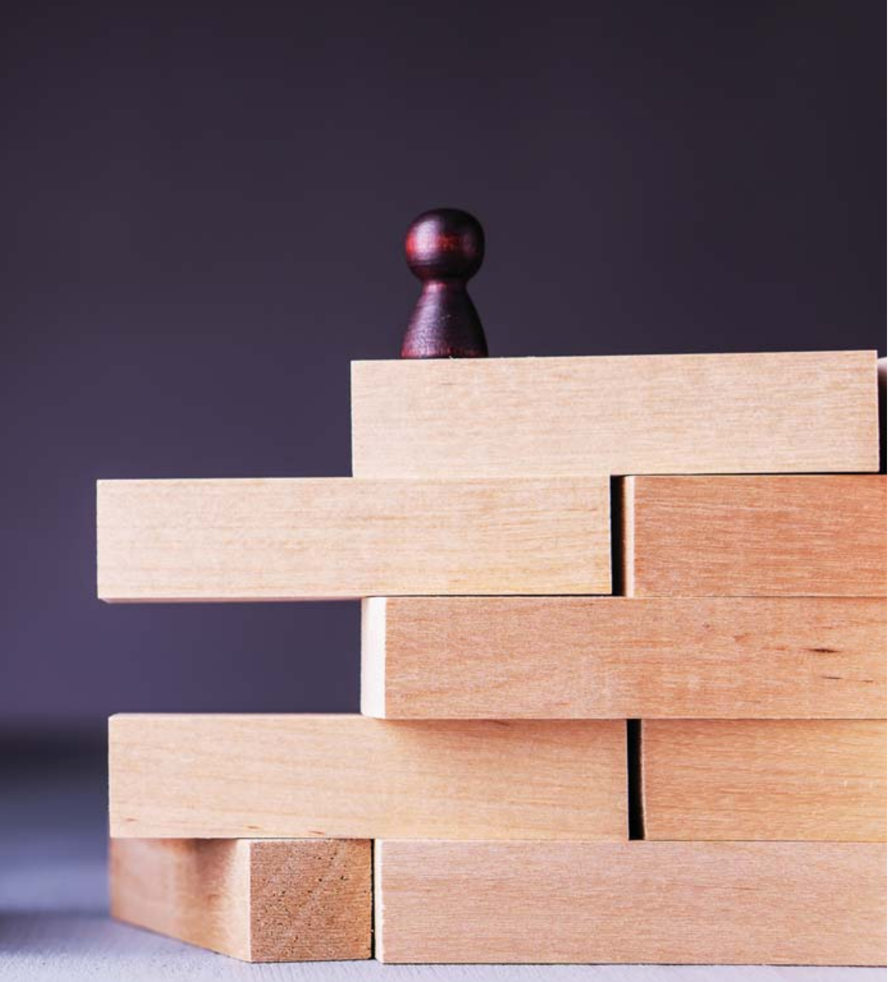
The primary purpose in B2B voice-of-the-customer (VOC) research is to obtain the required insights as input into crafting actionable strategies and tactics. The goal is to achieve success in terms of new products, new markets and making key customers "raving fans," to use the term made popular by Sheldon Bowles and Ken Blanchard's book of the same name.

This article will offer guidelines for how to conduct more effective B2B research while addressing some major differences between B2B and B2C, along with some implications on the research design.

Conduct research with a strategic perspective. Using a strategic perspective is important in B2C but it is more critical for B2B in our opinion. B2B research is like a jigsaw puzzle, piecing together different bits of information to make a complete picture. How will the client use the research? What are they going to do with the information? Is there a commitment from senior management to act upon the research findings?

In terms of customer satisfaction and loyalty, it is creating a story for each major account. For entering new markets, the issues are: How does this market work? What are the dynamics of the market? And, what are the key levers for success? For branding research, it is: What does your brand mean and how is it differentiated from the competition?

Focus your research efforts. In the B2B arena, there is almost always an 80/20 rule. This is defined as 20% of your accounts accounting for 80% of your revenue. This concentration of revenue is much higher than B2C. Optimizing your wallet share in these accounts will generate more dollars and profits than trying to raise your win rate in other accounts, as well as acquiring new customers. Raving fans are usually less price-sensitive, are open to purchasing additional products, services and solutions and will be



advocates for your firm in referring you to other companies who are not competitors to them. We are not saying you should not acquire new accounts but you need to spend extra effort on the lowest-hanging fruit: your key customers. Conversely, if one of those large key accounts churns over to a competitor, it would have disastrous effects on your bottom line.

Implications on research design. In the B2C world, there can be thousands to tens of millions of customers. Research thus requires statistical significance, random sampling and heavy use of data analytics to tease out potential opportunities. Then, after hypotheses have been constructed, one can use qualitative research such as focus groups, ethnography, mall intercepts, etc., to provide the understanding and insight behind the numbers.

B2B research is much different due to the high concentration of revenue. For assessing customer satisfaction and loyalty, as well as launching new products and services, the first priority should be to identify which customers are your major accounts. Major accounts are the 20% of your customers, those who control 80% of your revenue. If you have 200 customers, you probably will have 40 or so of these accounts.

Second, spend the vast majority of your research dollars on understanding and gaining insight on your performance in these accounts. Forget about statistical significance – you are gaining insight into what makes up 80% of your revenue. B2C research providers sometimes struggle with the concept of not being statistically significant.

Third, use a methodology that will give you deep understanding and insights. It probably will not be web surveys, which are relatively inexpensive but are unlikely to provide you the required understanding and insight, regardless of the platform utilized. When a web survey asks a qualitative question there are several key problems. The vast majority of respondents will not answer a qualitative question. Those who do answer give two- or three-word answers and do not expand on the answer. Last, they do not prescribe any recommended solutions.

B2B research requires qualitative discovery questions that are asked as part of a dialogue. For customer satisfaction and loyalty, the following qualitative diagnostic questions are useful: What are we doing well? Where do we need to improve? How do we compare to other competitors? How do we compare to your best-in-class vendors? Are we a vendor or a partner? How can we become a partner? How can we make you a raving fan? How easy are we to do business with? In the end, identifying the whys is the critical issue. We recommend using a heavy dose of qualitative discovery research in addition to obtaining ratings and rankings.

A rule of thumb is that if your key accounts make up 80% of your volume, you should spend 60% of your marketing research dollars there as well. If you want to contact other current customers, who are not your top accounts, then employ a less-expensive research technology such as web surveys.

To identify other companies for research, you can sample into accounts who have recently left you (within the last 18 months so they can still recall details) to determine why they left. This will yield great insights, although the answers may be difficult to hear. Useful questions include: What didn't you like? Why did you go with a competitor? What could have we done differently?

If you are looking at entering a new market or offering new products and services, consider sampling into other target prospects as well as competitive large accounts. The research with competitive customers will also provide you some information on your competition, making it easier to conduct competitive interviews, as you are confirming rather than fishing for information.

Determine the stakeholders and titles to be interviewed. In B2C, usually one or two people make a purchase decision. In B2B, there are many influencers and decision makers forming a buying unit. For example, you have economic buyers who evaluate the cost; and users, specifiers and purchasing agents who create the actual purchase order. Design a research plan to talk to each of them to obtain their perspectives.

Sometimes the people in these accounts are known, other times one needs to determine who they are by networking to reach the correct person. (The salesperson assigned to that account can assist but they can sometimes be wrong.) Who buys cutting fluids at an industrial account? Is it purchasing, an engineer, manufacturing or the maintenance manager? Who buys a copier at a law firm? Is it the managing partner, purchasing, office manager or other?

Here are some examples from actual projects:

- A manufacturer of plastic bottles sold its products to bottling plants of cola products. The following titles were interviewed: packaging engineers, to determine the impact on the bottling line; purchasing, to discuss any issues with delivery, quality and pricing; marketing, to discuss colors of labels and impact on their branding; and senior management, to discuss alignment with objectives, etc.
- For a power tool sold to contractors, it was the foreman, purchasing agent, the owner and a sample of a few contractors using the product. For commercial roofing, interviews were conducted with the roofing contractor, the general contractor, the building owner and the architect for new construction.

Assuming 40 accounts, at an average of three contacts per major account, the number of potential responses for key accounts would be 120 (three x 40), a very manageable amount. Even if the number is larger than 200, it is not thousands or millions of contacts.

Determine if the survey will be conducted blind or the sponsor will be identified. In consumer research it is very common to conduct the research blind so as not to bias the results. Often in advertising focus groups, the moderator does not mention the sponsoring company, while the client's marketing personnel may be sitting behind the glass.

In business-to-business research, unless the issue is awareness, we find it more productive to identify the sponsor of the research. You won't spend as much time chasing and explaining and the customer tends to give you longer and deeper answers. In fact, we ask the client to send out e-mails and hard-copy letters requesting participation. Response rates are generally 70%-80%, which is far higher than B2C survey response rates.

Identify the frequency and length of surveys. In the B2C world we see a lot of satisfaction survey research employed at every customer interaction, usually in the form of "Please take our five-question survey." This provides little insight and, in fact, causes survey fatigue. We prefer utilizing 25-30-minute qualitative discussions (usually in-depth phone interviews) every 12-18 months to track progress – or lack thereof – within each major account.

Determine the importance of the product or solution. Is it expensive or relatively inexpensive? Is it like copy paper or pens, where it is not worth a lot of time to constantly evaluate vendors? Is it bought in a package with other products, like metering pumps on a skid for pharmaceutical manufacturing? Is it a requirement for the end product, such as a chemical specified for a proprietary chemical coating?

Get the customer perspective through talking about the use of the product. There is a lot of digging in the research to determine the product's role. You become something like a detective, figuring out the story. This is different than B2C and can benefit from the involvement of a research partner with deep experience in B2B.

Identify the purchase process. For new markets or new products, one needs to understand the purchase process as well as the criteria for the selection. Does the product require a test-and-evaluation phase? What are the criteria that determine whether the solution will be purchased? Is it cost or capital cost? Is it lifetime cost or current cost? Is it ROI, payback or some other financial hurdle? Is it doing something better, cheaper or faster? Does a new vendor have to be approved? Is there a practice of consolidating or standardizing vendors? How does a new vendor get approved? This research can identify the make-or-break success factors in a go-to-market strategy.

Factor in recognition and risk. Although this occurs in both B2C and B2B, the consequences are much more severe in the B2B setting. If you buy the wrong toothpaste, you will just pick another brand next time. If you buy the wrong car, your spouse may get upset with you but hopefully you will be forgiven. In the B2B arena, if you buy the wrong ERP or CRM software, expect to be fired. An example of real risk with a past client is introducing a new product to civil engineers who specify road construction materials. They are very reluctant to specify a new product unless it has been successfully tested for years or even decades of winter freeze/thaw cycles.

Implications for research: The research for developing a go-to-market strategy needs to determine how the solution will be evaluated and the role of each of the influencers and decision makers. Also, it is critical to identify what can be utilized to reduce the perception of risk. This could be length of time in the marketplace, other big-name companies using your product, testing results from an independent lab, an engineer being provided on-site during the testing period, a trial run or a guarantee.

Explore experience and account service. According to industry research, 60%-80% of accounts leave, not due to price, but in response to how your customers feel they are being serviced. Research needs to be designed to determine how well your company services key accounts. Are we responsive? Are we proactive? Are we easy to do business with? In addition to ratings, it is beneficial to have detailed explanations and concrete examples, especially when it is a low rating. How effective was the support pre-sale, transaction and post-sale? How can we improve your overall service?

Assess the effectiveness of your communication. In customer satisfaction research, it is important to determine the effectiveness of the communication between you and each major customer. Is it clear? Is the company responsive? This is especially necessary in major accounts who are multinational corporations. Does the account manager listen effectively and communicate the concerns cited by the customer? Do they act as an advocate for the customers in marshalling the required resources across all countries?

Offer to assist your major clients' key customers in achieving their objectives. In the B2C world, this is not really a factor. In the B2B world, when you help to solidify the relationship bond between your major customer and one of their key customers, you win more loyalty. You become a partner, not merely a supplier, in strengthening the tie between your major account and their customer. Research should incorporate the asking: Is there anything we can do to help your largest customers? Note: they may or may not want this type of support.

Determine the role of incentives. It is an industry standard to pay consumers somewhere in the range of $125-$200 to participate in a focus group. In the B2B world, incentives are not normally necessary, as the customer wants to see increased performance from the vendor as the outcome. Sometimes you need to offer very senior executives the option to donate $200 to the charity of their choice. Occasionally, it is more efficient to use incentives to minimize the wasted time of dialing for interviews. An example of the latter is office supplies. It is usually not an important decision in terms of function or cost and the office manager normally does the purchasing. But it is very difficult getting these busy people to the phone for a survey, even to commit to a time for the survey. You may be better off giving them an incentive, like $50, for their time. For non-customers, like prospects, competitive customers and lost customers, be prepared to offer incentives. Please note that some companies have policies that prohibit incentives or gifts, so you may have to consider other options.

We see many clients who are reluctant to use these incentives due to the increased cost but it can have a very significant positive impact on increasing the response rate. It really is not worth trying to eliminate incentives when they are required.

Determine your alignment with customers. Sometimes it is useful to measure the alignment with a client's management team and their key customers. There are a lot of stories and paradigms within the client organization. For example, a salesperson may assume that customers leave due to higher prices but usually there are other factors that come into play. The C-level executives may be making decisions based on how the market operated 25-30 years ago and assume there have been no changes in the marketplace. Senior management may believe their brand represents something different from the perceptions of their customers.

Our firm likes to give the management team an abbreviated survey to measure the alignment with their customers. Oddly enough, we find that the clients who are closest to the customer tend to grade their performance a lot tougher. They have seen what it takes to meet the customer requirements behind the scenes, where the customer can't see all the problems. Other times the client is way too generous in rating their own performance – a clear signal of misalignment.

Develop actionable strategies

VOC research should be designed to develop actionable strategies and tactics. The success is not the end of this phase of research but is measured in launching new initiatives that drive additional revenue and profit.

In our research designs, the qualitative discussion is 60%-80% of the discussion guide, with the customer doing the majority of the talking. The interviewer concentrates on listening, probing and writing notes for the eventual transcript. There is a place for every research methodology and data analytics can be very effective in many situations but may not be the most effective methodology to deliver true insight. In B2B, you have a limited sample base and VOC research is very effective at digging out insights and fostering understanding.

There are many marketing research tools in the toolbox. But one needs to be careful to not fall prey to the old axiom: "If all you have is a hammer, everything looks like a nail." It is the responsibility of the market research provider to listen to the objectives of the research and present the best research methodology.

One of the primary goals in customer satisfaction and loyalty research is to make each of your major accounts raving fans. In order to obtain exceptional insights, ones that lead to actions, you need a mix of quantitative and qualitative data. Ideally, VOC research should lead to the design of specific strategies for each of your major accounts, with an eye toward getting corporate leadership to view research an investment instead of an expense.

We hope this article has helped clarify the differences in B2B research in the ongoing debate. We wish you luck and success in your next research initiative.

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case study

••• customer satisfaction

Mailed it

Paper surveys deliver for Chicago bank

| By Joe Hopper

snapshot

Joe Hopper offers a case study on how mail surveys – with an online twist – netted an impressive response rate for Devon Bank.

www.quirks.com/articles/2020/20200309.aspx

Who would think that old-fashioned paper surveys, mailed through the U.S. postal service, are a good way to conduct customer satisfaction research? Not us – until our firm faced a rather difficult need for research and we could think of no better way.

To our happy surprise, it worked! And not only did it work but it easily outperformed other modes of research typically used these days. Our traditional paper-based mail survey got a 25% response rate – with no additional attempts, outreach or reminders.

A seemingly super-simple customer satisfaction survey is now one of the most interesting and memorable research efforts of my career.

Here is the story of that survey – why we did it on paper, the problems we solved, the steps we took to conduct it and why it succeeded beyond what we had hoped.

We hope it provides some valuable insights for you about how to design and execute surveys when facing situations you may have never encountered before.

True melting pot

Our client was Devon Bank, a Chicago community bank located in an urban neighborhood that continually transforms as new waves of immigrants settle into the city, assimilate and make way for new populations from other countries. Its retail customers speak over 30 native languages besides English. They come from countries in Eastern Europe, the Middle East, Asia and Latin American – a true melting pot of cultures, languages and religions from around the world.

The bank did not have good e-mail addresses or phone numbers for most customers and, even if it did, we worried about a research firm reaching out to them in today's political climate. What the bank did have, of course, were postal addresses being used every month for sending account statements.

On top of that, Devon Bank is small. With only 4,000 customers in the

specific market we wanted to survey, there was no opportunity to think about sampling or potential stratification. Research industry response rates are exceedingly low these days, in the neighborhood of 1 to 3 percent. Our goal for a minimum sample size is generally 300. That would mean reaching out to every customer and achieving a 7.5% response rate. Yikes.

To make that happen (if it could happen) we thought through every last detail of making the survey easy, attractive and trustworthy. We ended up designing a research approach quite specific to this unique population and challenge.

Paper survey. With no e-mail addresses or phone numbers, our best option seemed to be a paper survey sent through the mail. We considered in-person surveys, or distributing surveys at bank branches, but the sporadic nature of in-person visits made that impractical. Regular U.S. mail from the bank would be expected, welcome and probably opened, so that was our choice. We decided to make this mailing special by sending it separate from the monthly statements, along with a postage-paid return envelope. We hoped to grab attention with an excellent layout, warm invitation and generous incentive.

Tested design. The last time I designed and conducted a paper survey was back in graduate school while working for the university's office of policy and planning. That was a long time ago. But there are still people who know a lot about designing and rigorously testing and refining excellent surveys on paper: the U.S. Census Bureau. So we printed out a copy of the American Community Survey and it became our blueprint for how to ask questions on paper. Then we gave it to our graphic design team and asked them to create the exact same look and feel for this unique mode of administration.

Sincere invitation. The survey came with a letter directly from the bank president and it described why the bank was doing it and how it would be valuable to customers (not to the bank). Plus it offered to pay respondents for their time. My favorite sentence was this: "An open dialogue between you and the Bank is an essential part of building and maintaining a strong relationship." This approach is the opposite of what we often see in survey invitations, like the obnoxious one I received just last week: "Your Help Is Key to Our Success."

Good incentive. Customers were offered $5 for completing the survey, which the bank would deposit directly into their accounts. That seemed like an attractive amount for a non-affluent population and for a simple five-minute task. Looking back, perhaps we could have paid less (maybe $2) and easily hit our target of n=300. But we also knew there were no second chances. Unlike e-mail, which is nearly instantaneous and allows for easy testing, we could not recalibrate and adjust once we launched. We all agreed that paying a good incentive was a commitment worth making upfront.

Super-short. Devon Bank had never surveyed its customers and it wanted to know a lot. But filling out surveys is a burden and with all the challenges we faced in overcoming resistance and having no second chance, we argued for a very short survey. In the end, we asked 16 questions, which took respondents roughly five minutes to answer, laid out on two pages (the inside-facing pages of a 17x11-inch folded piece of paper). It was short enough to keep respondents engaged and we still got detailed data for a rich analysis of satisfaction, importance of services, age differences, banking with competitors and much more.

Multiple languages. Our survey documented 30 different languages used by the bank's customers and of course we surveyed only one-quarter of them. Translating into all these languages was not financially feasible, nor did we know exactly what all the languages might be. So bank staff estimated we could focus on these top five: English, Russian, Arabic, Spanish and Hindi. The invitation included in the survey offered prominent call-outs with text in each language explaining the survey (and the $5 incentive) and providing instructions on how to access non-English versions.

Online option. We had to offer an online version for one big reason: the survey was offered in five languages and there was no way of knowing which version should be sent to whom. Nor was it practical to offer all versions by mail, because the mailing needed to be clean and inviting. So we translated and programmed the full survey online, accessible directly from the bank's website. Each mailed survey offered a unique five-digit survey code for access, which we intentionally did not call a PIN in order to avoid any confusion with other banking-related PINs.

Research company invisibility. Sometimes highlighting the involvement of an outside firm enhances the credibility of a survey. It can offer a reassuring promise that even negative feedback is welcome and useful. For this population, however, we expected sensitivity around a third-party collecting data and therefore decided that all communications should come from, and return to, the bank. The invitation and survey were on bank letterhead and the postage-paid return envelope was returned to the bank as well. We did not promise respondents anonymity but the bank agreed to let us manage the data and strip out personally identifiable information in the process.

Nervous for weeks

We were nervous for weeks after the mail drop. One or two came back each day. We fretted, knowing that there was no way to remediate if our plan didn't work – no easy way to send reminders, boost the incentive, reach out to more sample or make more phone calls. For three weeks it seemed we might be looking at failure.

Then our contact at Devon Bank called: "We just got 500 surveys!" No, we did not believe it. As good researchers, we searched for disconfirming evidence by considering all the alternative explanations of what had happened. Perhaps the 500 surveys were returned as bad addresses (but surely we must have a good list – the bank mails statements every month!). Perhaps the printer mailed back the overage and these surveys were blank (but we confirmed the printer had only a handful and they did not ship them back).

Well, it was true, they really did get 500 surveys and more than 500 additional surveys came on top of those. Our old-fashioned paper-based mail survey got a 25% response rate, with no additional attempts, outreach or reminders.

When I shared the final research report with the bank's executive committee, the CFO jumped in quickly to ask why they got such a great and unexpected response rate. I answered by segueing into the results of the survey: they had strong relationships with customers; their customers really like them; they had not poisoned the well by nagging with a survey after every transaction.

I should have taken some credit, as well. We knew the challenges we faced. We thought through every approach possible and addressed every point of resistance we could anticipate. We brought up-to-date knowledge and expertise and applied it to some old-fashioned techniques in novel ways that were truly unique.

Yes, old-fashioned paper surveys are still a viable option. In some cases they may be the only option. If you know what you are doing, you can make them as successful as online surveys – and maybe even go 22% better.

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••• cx research

Context is key

Rethinking the role of surveys in customer experience management

| By John Goodman

snapshot

Want a positive impact from customer surveys? Employ an organized approach to using them and place them within the broader VOC data context, the author says.

I recently worked with three companies that are struggling with how to place surveys within customer insights, continuous improvement and customer experience (CX). In one company, the primary role of the survey function was to measure service transactions with an end-of-year focus on the results of the annual relationship survey. In the second company, while Net Promoter Scores (NPS) were ubiquitous and used in evaluations from the frontline staff to major business unit leaders, little seemed to be getting fixed. In a third company, only three surveys were executed but all resulted in continuous improvement and a positive impact on executive strategy. The key to a positive impact is an organized approach to using surveys appropriately and placing them within the broader voice-of-the-customer (VOC) data context.

The two key phrases for the role of surveys are "appropriate use" and "data context." In most companies, 90 percent of survey resources allocated to CX (as opposed to market research) are devoted to measuring frontline performance and closing the loop to contact customers who are unhappy with a transaction or service interaction. While both activities do have value, they are not the most cost-effective use of resources. Surveys are a valid source of feedback to service staff but, due to small numbers, often are not an appropriate indicator of performance for individual customer service representatives (CSR). Using surveys for customer win-back activity is certainly noble and productive, but consists of chasing the horse after it has left the barn. A much more cost-effective approach is to fix the barn door; that is, to devote a higher percentage of resources to fixing the entire CX and the tools available to the service staff.

Much of my book, Strategic Customer Service, is devoted to the VOC and its application within an organization.[1] The book suggests new objectives for surveys by placing them within a broader VOC context, creating a credible business case and moving to a tailored consulting approach of packaging and delivering results.

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At a macro level, there are five types of surveys:

- transaction surveys that measure the outcome of a particular interaction;
- relationship surveys that gain feedback about most or all of the customer journey including key points of pain (POP) and their impact on loyalty and satisfaction;
- competitive surveys that ask current customers about their experience with both the company and its competitors;
- market research surveys that address a person's willingness to purchase a current or hypothetical product; and
- pulse/public affairs issue surveys that address emerging political or social events.

For a systematic VOC process, only three of the above are relevant: transaction, relationship and competitive surveys. The problem comes from how the surveys are used and their context or lack thereof. Surveys can either be for creating a baseline from which improvement goals are established or for tracking progress toward a previously set goal. The accompanying table illustrates these two broad purposes and how the five types of surveys can be directed.

Baseline and tracking surveys can be directed toward a particular transaction, the overall CX or the competitive marketplace. However, the focus for all three of these surveys is the existing customer. Market research surveys primarily explore how to win new customers or, secondarily, sell new products to existing customers.

Two broad objectives

There are two broad objectives for VOC surveys: 1) establish a baseline from which priorities and goals can be set and 2) track progress toward those goals.

Surveys are a very cost-effective way to establish baseline levels of customer satisfaction and loyalty, as well as for comparing company performance to competitors via competitive benchmarking surveys. Customers can be asked about each phase of the relationship, the level of problems, responsiveness to issues and a set of outcome variables including satisfaction, loyalty, word of mouth (WOM) and value for price paid. The problem level and resulting overall satisfaction, loyalty and, if desired, NPS, all indicate baseline levels from which priorities can be set and goals established.

Objective	Survey Focus				
	Transactional (measuring individual transactions)	Relationship (across whole customer journey)	Competitive (for existing customers) to benchmark competition	Market research (to win new customers)	Pulse / public affairs
Create a baseline and to understand issues	Understand current levels of satisfaction, key drivers and economic impact, and set priorities to establish goals				Address newly emerged topic
Track progress	Measure progress against goals				Progress on current topic

Establishing baseline levels of satisfaction and loyalty

The baseline survey can identify overall satisfaction as well as the underlying problems that damage satisfaction. The survey allows estimation of the damage in loyalty, word of mouth and revenue from not fixing each of the problems. Unfortunately, understanding the "why" of problem occurrence is not so easily derived from surveys. Surveys are not as effective as diagnostic devices. An understanding of the details of a problem, the number of customers actually encountering the problem and the cause are difficult to precisely discern from survey data.

An effective analysis of customer problems depends on the ability to understand the actual number and cause of each POP. The number of problem occurrences and their cause can be clarified by placing the survey results within the context of other data sources. Operational and customer contact data, as well as employee input, is helpful. Operational data can quantify exactly how many customers suffered a service failure. Customer contact data provides complaint volume and underlying customer expectations. Employee input will explain the cause of the process failure.

Benchmarking your company against others. Another type of survey, which is often used in oligopolistic industries, is the benchmark survey where you measure both your company's performance and the parallel performance of key competitors. You can obtain information about your customers' experiences across the journey but also their experiences with competitors. This data can highlight your company's strengths and weaknesses and suggest opportunities for improvement.

Setting priorities. Survey data that simply reports CX across the journey is often not actionable. The main question management wants to answer is: What are the top five issues or POP customers are encountering and how much are they costing us? Once key customer POP have been identified, priorities must be set. Surveys usually report key drivers of the desired outcome such as satisfaction, effort, loyalty or value for price paid. These can be reported in a vacuum or within the context of operations such that management understands which priorities can be realistically addressed. This financial component estimates the revenue damage and, ideally, the WOM damage of not addressing a problem. The table provides a simple example of such a business case for top issues.

Combining survey, operational and complaint data and employee input creates a complete picture of the problems and their cause(s), the cost of resolution and the cost if not resolved. Goals can then be established based on a cost/benefit analysis. In this example, data systems to render lead times more accurate (POP 2) and improved processes to make sales reps more accessible (POP 5) should cost $2 million and $1 million, respectively. Significantly reducing or eliminating POPs 2 and 5 is estimated to provide a payoff of $21 million and $16 million each, delivering ROIs over 500 percent. These two POP are identified as cost-effective priorities.

Outcome goal-setting. Once priorities are established, goals for improvement can be set. The rational approach to goal-setting is to identify a limited number of attainable objectives and set annual goals for improvement. The goals can be outcome-oriented – for example, a 3 percent improvement in satisfaction ratings. This type of outcome goal can be applied to a transaction or an overall customer relationship. In the above ex-

Frequency, Revenue Damage and WOM impact of Top POP

POP	Frequency	Loyalty impact	Satis-faction impact	Total revenue at risk	Negative WOM per occurrence	Cost to resolve
1. Long lead times	10 %	10 %	1.0%	$10 million	3 told	$20 million
2. Inaccurate lead times	6 %	35 %	2.1%	$21 million	5 told	$2 million
3. Short shipment	2 %	15 %	0.3%	$3 million	2 told	$4 million
4. Unresponsive service	5 %	20 %	1.0%	$10 million	5 told	$3 million
5. Hard to reach sales rep	4 %	40 %	1.6%	$16 million	8 told	$1 million
				$60 million		

ample, if Problems 2 and 5 are mitigated or eliminated, satisfaction should rise by over 3 percent (2.1 percent plus 1.6 percent) so a 3 percent increase should be more than attainable.

A second type of goal can be a process goal. Process goals are metrics applied to a process such as the percentage of calls closed on first contact or number of on-time deliveries. The benefit of using process metrics is that you can see if the process fix is having a positive impact without having to execute a new survey. Ultimately, you want to confirm the indications of the process metrics with outcome measures of satisfaction gathered by fielding a new survey, which confirms that the targeted points of pain have diminished in prevalence.

Beware of a common error in objective-setting. I recently received a call from a client asking advice on setting next year's overall CX satisfaction objective. The client stated, "We are at 84 percent satisfied, so we were thinking of 87 as the goal." Why 87? "It's higher than 84 but a reasonable lift we hope we can achieve." This is the wrong answer. Goals should not be arbitrarily set. Goals should be based on an assessment of how much progress can be made on the metric if specific defective processes producing a measured amount of dissatisfaction are improved.

One leader must be accountable

An action plan has the role of specifying which POP will be addressed; how they will be addressed; the expected improvement in outcome metrics such as satisfaction or loyalty for each POP; and a responsible leader. As noted in the book The Amazon Way, almost all problems are cross-functional but one leader must be accountable for action.[2] A single functional leader is designated to lead on each issue and for obtaining the cooperation from other functions on the issue team. Short-term success is measured via process metrics.

Process goal-setting. For one recent client, customer dissatisfaction was being caused by the invoice error and adjustment process. When the process fix was proposed by the continuous improvement department, we established operational baseline metrics for calls about invoice errors and for repeat calls about adjustments per 100 orders. We set a goal of a 50 percent reduction in calls for errors and a 70 percent reduction in repeat calls. Since there were operational records for both items, it was easy to discern within two weeks that the process fixes actually had a positive impact. When the next satisfaction survey was executed, customer dissatisfaction with the invoice process had almost disappeared.

Tracking progress of the organization and individual

Tracking an organization's progress is easy using aggregate-tracking survey data based on surveying thousands of transactions per month. Even a 10 percent survey response rate assures statistical validity for measuring unit and corporate performance. Where difficulty arises is when surveys are used to evaluate an individual CSR's performance using a small number of surveys. In most organizations, only two to five surveys are received per CSR per month – certainly not a valid sample.

Validity is further eroded if the survey questions apply to the organization rather than the individual CSR. For instance, one company evaluated representatives on the customer effort expended to resolve their problem when almost all customers had first visited – and been frustrated by – the company website. In another company, the CSR was evaluated by the NPS question: "How likely is it you will recommend [the company] to an associate?" The score assigned was not attributable to the CSR but included the website experience, product quality and product fill rate – none of which the CSR had control over. Management must place small numbers of surveys within a broader context of call observation and transaction type.

Greater causes of dissatisfaction

A majority of companies I've audited devote the bulk of survey effort and resources toward evaluation of the frontline CSRs. Systemic problems in service, marketing and product performance are always greater causes of customer dissatisfaction than the CSR-controllable behaviors and skills. Therefore, the majority of analytical effort should be devoted to diagnosing the contact center process, the website self-service function and the corporate sales, marketing and customer onboarding process rather than creating fancy CSR feedback platforms.

The analysis must provide an economic imperative for action. Each POP must be converted into the number of customers or revenue at risk due to the problem. In my book, I outline two economic models that quantify the cost of inaction. The market damage model quantifies the revenue loss and word-of-mouth damage of the overall status quo. The market-at-risk model quantifies the revenue damage of specific problems and POP. The two models together identify which problems should be attacked to achieve the highest ROI. Many companies, including 3M, Chick-fil-A, Whirlpool, Toyota and USAA have found the models an effective tool for jump-starting their CX initiatives.

Results must be packaged so that the internal organizational customer will take the time to read the report. Your survey report is competing with numerous inputs the manager receives that day – make it one of the easiest to digest. A good test is to ask five recipients what action they took based on last month's report. If they took none, the report should be revised.

The report should start off with a summary that answers the question, "Why should I devote five minutes to look at this?" The answer must include an impending threat as well as a carrot of economic or career gain if action is taken. Further, the summary should allude to a positive area of high performance that makes the unit look good. The reader will forge ahead to learn more about that golden nugget.

Best practices for increasing survey impact

Prepare management for bad news. Remind management that while most customers are generally satisfied, the opportunity for enhanced profit and revenue rests with those customers who are either dissatisfied or not delighted, just satisfied. The gold lies in the bad news, not the good news. Additionally, highlight good news to recognize and motivate employees.

Place survey findings in context. Surveys should be used as one of at least four data sources: contacts/complaints; operational failures; visits and focus groups; and employee input. The operational data will reveal how many customers had the problem while the survey will explain the damage caused by each point of pain. Complaint data will explain where customer expectations or errors contributed to the problem. Employee input can further explain customer-based issues while also highlighting internal processes that cause the POP.

Give customers a good reason to take the time to respond. Customers are being bombarded with surveys, often multiple times a day. We have found that if the invitation indicates two actions recently taken based on previous customer input, a potential respondent will view the effort of completing the survey as a good investment. They think, "If you've paid attention to input in the past, maybe you'll fix the things that drive me nuts about your company." We've seen significant increases in response rates when such a message is provided.

Package the survey results to create action. Specific suggestions include: summarize the top three opportunities and the monthly cost of no action; tailor the findings to the individual recipient – while this takes more effort, it leads to greater impact; tie the results to an operational metric that the function takes seriously to ensure relevance; follow up each report with a short meeting to clarify (which also stimulates the recipient to read the report).

Placed within context

Surveys will have more impact if they have clear objectives, are linked to other types of data and create a business case for action. To be cost-effective, surveys must be placed within the context of operational, customer contact and employee input data and be accompanied by an action plan fixing accountability for addressing the priority issues identified. Further, unless many survey responses are obtained for an individual employee, surveys should be used sparingly for individual evaluation and only in concert with observations and operational data.

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••• ad research

Keep the lawyers at bay

Using research for advertising claims substantiation

| By Jerry Thomas

snapshot

Make sure you do your homework – and your research – if you plan to make comparative advertising claims.

Senior executives are competitive types, typically, and want to confront the competition head-on. Their mantra seems to be "Let's drop a bomb down the market leader's smokestack" by a frontal attack with comparative advertising claims. "Let's advertise that our product is preferred by consumers two-to-one over the market leader's brand."

This type of bravado appeals especially to senior marketing executives, who see it as a great way to gain market share at the expense of a hated rival. The senior vice president (SVP) of marketing calls in his consumer insights team and says, "We want hard evidence, proof, that our product is preferred over the market leader's product two-to-one. This is a rush project, of course, so get to work."

The first question to ponder: Is it a good idea to make a head-to-head comparative claim against a competitor? First, consumers tend to think that brand-to-brand comparisons are in poor taste, unfair and unsportsmanlike, so it's possible the comparative claim could backfire. Second, consumers are often skeptical of comparative claims in advertising and tend to discount them. Third, it's possible that your great head-to-head comparison claim will be remembered as advertising for the better-known competitive brand. Fourth, the competitive brand's management team might take offense at your advertising claim and file a nasty lawsuit.

So, before your marketing executives rush off to create that great head-to-head commercial, a recommended best practice is to test a number of different advertising claims or messages to see which types of claims resonate with your target audience. Chances are you will find claims better than the brand-versus-brand comparisons. However, there's usually no time for such claims-screening, because in today's fast-paced, throw-it-against-the-wall, skip-the-research, agile world, the SVP of marketing is jumping up and down and hell-bent on directly attacking his nemesis, the market-leading brand. What the heck do you do?

Very often, the researcher might be asked to find evidence in existing studies to support a new head-to-head advertising claim, or asked to go out and test lots of comparative claims in one big study. These are fools' errands. Your competitor's lawyers will subpoena all of your brand's research studies and expose them in open court and then take glee in every little

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methodological flaw in every study. (And, by the way, each and every one of those studies in your files can be picked to pieces by a good lawyer. Your studies are not nearly as perfect as you believe.) The plaintiff's lawyers will have a jolly good time revealing all the evidence in your research studies that disprove or countermand the exact claim your SVP wants to make. How can you develop evidence to support your advertising claim, that will be accepted by the major networks and hold up in court should your company become the defendant in a lawsuit?

No generalities

Let's suppose you did have time to do a claims-screening survey and you did find a comparative claim that appeals to your target audience. To construct a defensible research design, you must know exactly what comparative claim the SVP of marketing wants to make. The claim tested must be the same, exact language that will be used in the advertising. No generalities, no broad strokes. Precise language is a must.

For example, the claim might be, "A majority of U.S. adults prefer the taste of Heinz Ketchup over Hunt's Ketchup." This is an assertion you can test; you can design research to prove or disprove this claim. Another example, "The taste of Skippy Peanut Butter is preferred two-to-one over the taste of Peter Pan Peanut Butter by U.S. children." Apart from ambiguity over what "two-to-one" means, this is a specific claim that probably can be tested.

Oppositely, you must avoid trying to design research to support general claims, such as "Skippy Peanut Butter is better than Peter Pan Peanut Butter." What exactly does "better than" mean: its color, its packaging, its ingredients, its texture, its price or what?

The claim determines the design

Once you have a highly precise, specific comparative claim to test, then you can design research to prove (or disprove) that specific claim. The specific claim largely determines the research design. Qualitative research (focus groups, depth interviews, online forums, etc.) generally cannot be used to substantiate advertising claims. Sample sizes tend to be small, the qualitative discussions will contain countervailing evidence and the open-ended natures of the answers do not lend themselves to statistical significance testing. Qualitative research is not an option.

If you can prove your claim with credible secondary data, that might be a workable solution, unless that secondary data source also contains information in conflict with your claim. Usually, however, you will have to do primary research in the form of a survey to precisely determine if the proposed comparative claim is true or false. Some rules of thumb:

- A large sample is better than a small one. The sample must be large enough to be statistically significant at a 95-percent confidence level – or 99 percent, which is even better. More important, the sample must sound "large" to the judge, jury or review board, regardless of statistical significance. A sample size of at least 1,000 target-audience respondents is typically recommended.
- The sample must represent the whole market, as defined by the specific claim. So, in the previous example, "A majority of U.S. adults prefer the taste of Heinz Ketchup over Hunt's Ketchup," the sample must consist of "all adults" in the U.S. (that means all 50 states, plus Washington, D.C., plus U.S. territories). Adulthood is generally defined as beginning at age 18, so the sample would be anyone 18 years of age or older living in the defined geographic areas.

  You will note that the sample would include U.S. adults who do not use ketchup, because your claim did not place any limits on "U.S. adults." The sample must be representative of all U.S. adults, including ethnic minorities, men, women, high income and low income and all geographic areas. A random sample, or as close to random as possible, is the most defensible sample. A stratified random sample can be defended as an improvement upon a purely random sample.

  However, if you should choose to do 100 surveys in each of the 10 most populous metro areas in the U.S., that would not be an acceptable sample. The adults in the top metro area (i.e., the metro area with the largest population of adults) would be less represented than the adults in the 10th largest metro area; and all the other metro areas and rural areas would be omitted from the sample. Remember, the sample must represent all U.S. adults equally.
- When designing the questionnaire, other than some demographic questions to prove the sample is representative, you should ask only one question. If you ask a number of questions about the two ketchups' taste, for example, you are only creating a playground for opposing lawyers to discredit you in front of judge and jury.

  Different questions will create different results and the lawyer will use these differences to weaken your claim and destroy your case. To continue with the ketchup example, the one question might be worded as, "Which one of these ketchups do you prefer, Heinz Ketchup or Hunt's Ketchup?" To eliminate positional bias, you would, of course, rotate or randomize the order of Heinz Ketchup and Hunt's Ketchup in the question. But, wait a minute, something is wrong with our question. The advertising claim we hope to prove ("A majority of U.S. adults prefer the taste of Heinz Ketchup over Hunt's Ketchup") will not be proven by the proposed question, because we did not include the key word "taste" in our question.

  Okay, so let's revise the question to read: "Which one of these ketchups tastes better to you, Heinz Ketchup or Hunt's Ketchup?" Again, we would randomize the order of the brand names in the question. We are getting closer to an ideal question but we are not quite there. The wording "…tastes better…" is not exactly the same as "…prefer the taste of…." Remember, our question wording should ideally use the identical language as the advertising claim. So, we finally decide on the exact question: "Which one of these ketchups do you prefer the taste of, Heinz Ketchup or Hunt's Ketchup?"

  Darn it. We are closer still but the question is not yet perfect. So, we think some more and craft this final question: "Do you, personally, prefer the taste of Heinz Ketchup over Hunt's Ketchup; or do you, personally, prefer the taste of Hunt's Ketchup over Heinz Ketchup? The order of the two sentences in the question would be randomized, of course. Our answer choices would be:

Personally prefer the taste of Heinz Ketchup over Hunt's Ketchup

Personally prefer the taste of Hunt's Ketchup over Heinz Ketchup

The order of these two answer choices would be randomized, of course. Oh, but we forgot something. What if someone did not prefer one ketchup over the other? We must add in a "no preference" answer choice, such as "Do not prefer the taste of one ketchup over the other." Now, the questionnaire is ready.

• To achieve a representative sample in this example, the recommended method would be to recruit a national probability sample of U.S. adults who agree to participate in a ketchup taste test and then ship a bottle of Heinz Ketchup (branded), along with a bottle of Hunt's Ketchup (branded), to each respondent.

Participants would be asked to use both ketchups in randomized order over a period of several days and then complete an online survey about their experiences. During the follow-up survey, your carefully crafted taste question would be asked. You could do a blind taste test (i.e., unbranded) rather than branded but then you would have to change the claim to fit the blind methodology.

As you go about designing the research, creating the sampling plan, crafting the questionnaire and anticipating the analysis, you normally leave a paper trail (and an electronic trail). For any research that might end up as evidence in a lawsuit, you do not want a paper or electronic trail haunting you. Such records are a boon for opposing lawyers. A best practice is to rely on phone conversations and in-person discussions (without any audio recording devices present or written notes lying around). Then, once everyone is in agreement, you put down on paper (or in computer memory) the one plan, or one questionnaire, that sums up your decisions. If you leave a paper trail, you might have to explain to the judge and jury each of the 10 drafts of the final questionnaire and why you changed each and every word from one draft to the next. Leave as few tracks as possible. Of course, you will need documentation of exactly what you did, and how you did it.

Attacked by the lawyers

Regardless of the research design and the data collection method chosen, your survey will be successfully attacked by the opposing lawyers. All of our survey research methods have flaws that smart lawyers will exploit in court. In the example of the Heinz-Hunt's in-home usage taste test, for instance, the opposing lawyers would point out that a) you did not personally visit any of the test households and observe, and can't prove who actually took the survey; and b) nor can you prove the participants actually tasted the two ketchups; and c) nor can you prove participants did not confuse the two brands and answer incorrectly, etc., etc. Every other data collection method can also be ripped to pieces by well-prepared opposing lawyers.

Most courts, however, will accept survey-based evidence, if the research company's reputation is solid, if the research firm is independent and objective and if it appears that the research methods are reasonably sound. You must use a professional research firm for claims substantiation research; it's not the time or place to try out your do-it-yourself survey skills.

Years ago, a consultant to one party in a legal dispute (a client of ours) decided to save some money and do his own survey and present the results in court. The plaintiff's lawyer cross-examined him without mercy until the poor fellow ended up vomiting in a nearby trash can. Cross-examinations are somewhat akin to having splinters shoved under your fingernails.

Speak softly

While there is much more that could be said about advertising claims research, the key point is the importance of seeking professional legal help and professional research assistance. Few advertising claim disputes ever actually go to trial but you can spend millions of dollars and waste months of time producing subpoenaed documents, answering interrogatories, preparing for depositions and suffering through depositions.

Some advertising claim disputes are resolved by media network feedback, some by cold feet, some by bankruptcy and some by wisdom. Excessive bravado puts a company and its brand at the greatest risk of a court appearance. So, speak softly and leave that "big stick" at home.

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••• ad research

Taking up a lot of memory

How sticky advertising aids brand-building

| By Charles Young

snapshot

Effective ads can have both a short-term and long-term impact, the author's research shows.

Digital has changed many things in advertising. The biggest one for ad researchers? Real-time campaign feedback. But there is growing concern among marketers that this focus on short-term results comes at the expense of creative quality and brand-building.

A generation ago, advertising researchers, such as John Philip Jones and Jan Slater, authors of What's in a Name?, demonstrated that, at least for TV, if there is no short-term sales effect, then there will be no long-term sales effects either. However, the converse is not true – even if there is a short-term sales lift, that does not mean there will be long-term sales contributions. Effective brand-building advertising should do both.

The key is advertising quality – in particular, how sticky the advertising is in consumer memory. After all, brands are not physical entities; they exist only in the minds of customers – brands are structured memories. Like the board game Risk, the goal of the marketer is to colonize more memory space in the mind of the consumer for their product category than their competitors do. Marketing is a game of memory.

Encoding of experience

As a simple model, we can think of human memory as organized much like computer memory in that both include a scheme for the hierarchical encoding of experience. There are similar levels of the memory hierarchy used in designing computer architecture. At the top is the memory register, which is a very small amount of very fast memory necessary for the central processing unit (CPU) to manipulate data. This is the computer analog of the conscious mind. At the next level is cache memory, or locations where frequently requested information is stored for high-speed access. This is the analog of working memory. Below cache is the level of main memory, or random-access memory (RAM). This is the memory system that has been organized according to categories or lists of meanings so that it is searchable in multiple ways.

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The hard drive is next. This is where the gigabytes of pictures taken on your smartphone are stored. The bottom levels of the computer architecture analogy represent slow-to-access memories that are stored in various forms off-site. These days that's the cloud.

Switching to human memory, at the top is the level of consciousness. Here the memory space is small. The original seven-digit length of a telephone number, as Bell Labs found, was the limit that an average person can easily hold in conscious memory. Or the length of a six-second Facebook ad.

The second level is working memory. Working memory deconstructs experience and transfers it into long-term memory. It's shorter than most people think, lasting only about 30 seconds or the length of a typical brand story ad.

Third is the deeper level of memories that you can recall with some effort. These are memories that have been properly categorized and organized according to meaning in semantic memory. Words are used to tag the meaning of those memories so that they can easily be called forth, like the tags for YouTube videos.

Fourth is the deeper level of memories of past experiences that you cannot recall spontaneously but that you can recognize if given a cue. This is the difference between recognizing the face of someone you've met before but whose name you've forgotten. These are memories that can only be retrieved by showing people a piece of the original experience, like a picture or the taste of Proust's petite madeleine.

Most of the non-verbal memories that accumulate in our action-memory system (procedural memory) and our social-memory system (episodic memory) – especially from our pre-adult years – have not been organized and tagged with verbal meanings. Memories that cannot be recalled on demand is what the unconscious mind is.

Fifth are memories stored off-site, in the heads of other people. These are not just memories of the "Honey, have you seen my keys?" variety. Most of the memories that we need to live and do business in the world are found in the heads of the others we interact with, such as butchers, bakers, doctors, lawyers, teachers, priests, etc. Tradition, knowledge and culture operate at this level of memory.

Mental shortlist

In business terms, a hierarchical approach can also be used to manage a brand in memory. The most important measure of brand strength is top-of-mind brand awareness. By top-of-mind, I mean the first brand that is mentioned spontaneously by the consumer when given a category cue. Unaided awareness is derived from all the other brands that are mentioned and form the consumer's brand consideration set. Together, these are the brands that are on the shopper's mental shortlist.

As a percentage, either top-of-mind or unaided awareness can be used to measure a brand's share-of-memory in the category and is the single best predictor of share-of-market. The category leader usually has the strongest top-of-mind awareness, aka brand "salience."

Below that are the brands consumers can recognize from a list – aided brand awareness. Aided brand awareness is a key measure for new products and niche brands.

Memories that have been tagged with word-meanings can be retrieved through verbal recall. These are memories stored in the semantic memory system and much of the content is rational – the product concept, features and benefits, reasons to believe, etc. All of these memories speak to the brand's positioning vis-à-vis competitors. But at an even deeper, emotional level lie memories of brand experiences that the brand user can recognize with a visual cue but cannot recall verbally.

Collectively, these are the memories that make up the brand image. Below that are brand memories stored off-site – tribal memories stored in other brains that can be accessed through word-of-mouth and product reviews. This is the basis of shared memories, which are the key to building a brand community.

Arts of persuasion

If I were to pick just one metric from consumer research as a measure of current brand strength, it would be top-of-mind awareness. Any salesperson will tell you that the key to making a sale is to first get on the customers' shortlist and then to move them to the top of the list through the rational and emotional arts of persuasion.

As a report-card metric, it is fast-moving – reflecting the complex dynamics of the marketplace. It is the leading indicator that moves up first

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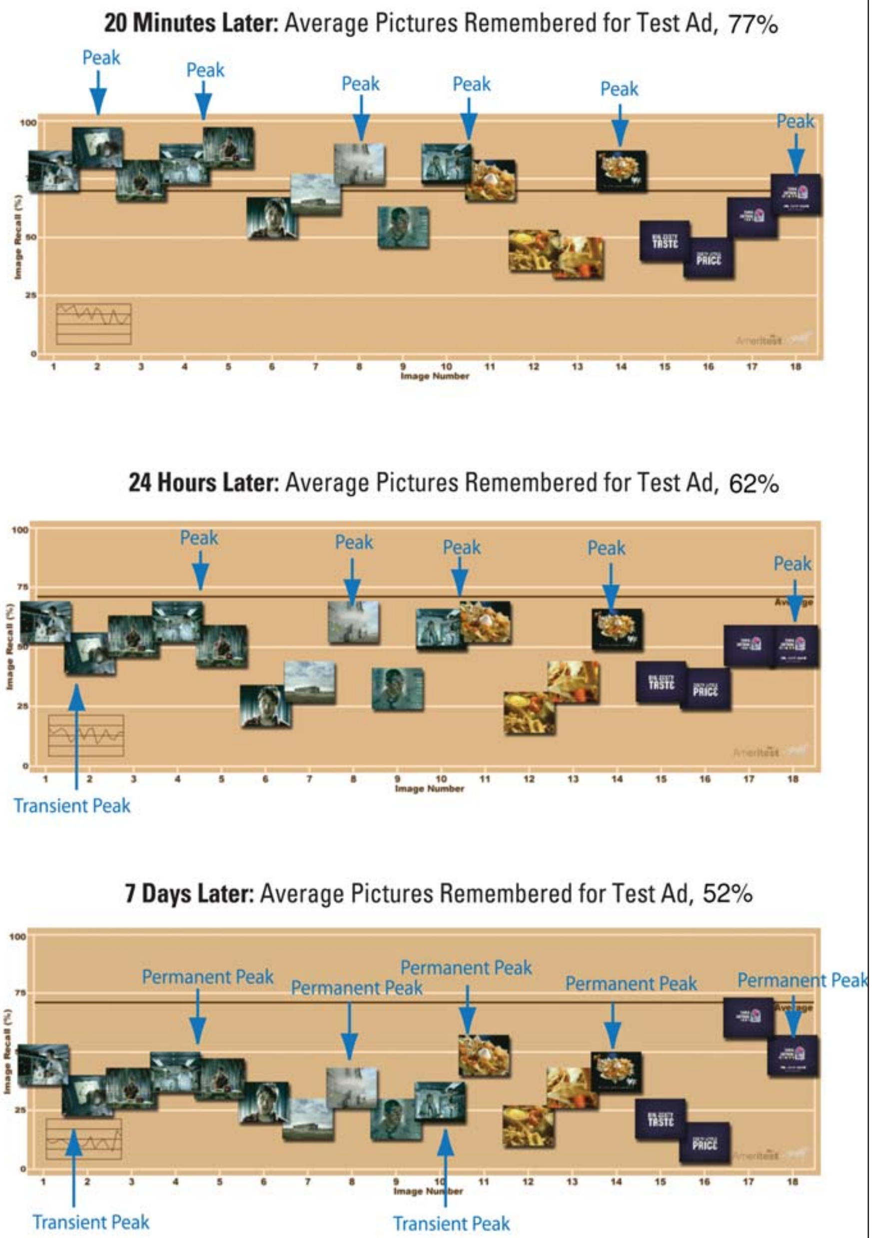
Figure 1

Structure of Visual Memory Over Time



As the memories of images decay, the rhythmic structure of image recall remains fairly intact over time though a few peaks fade.

when an established brand is doing well and also moves down first when the brand is doing poorly.

The fact is, top-of-mind awareness is strongly correlated with future purchase intent across most product categories. The main drivers of top-of-mind brand awareness are behavioral – brand last purchased – and advertising. (It is a circular relationship, of course.)

Ad awareness is a function of two variables. First, how much money is spent with various media platforms to reach a target audience. Second, the creative quality of the advertising itself. Of the two, quality is more important. Study after study, including a major one from Nielsen this last year, has once again shown that creative quality is the main driver of advertising ROI.

A few years back we built and published a sales model, using just our own data from testing over 2,000 TV commercials in the fast-food category to explain monthly growth in same-store sales over 77 months for McDonald's. We found that creative quality explained about 45% of sales growth – a number similar to what Nielsen found. The main variable in the model found that the momentum variable for advertising in the fast-food category lasted about three months after a typical ad went off air.

Will it be remembered?

When determining creative quality, two of the most important questions an advertiser should ask are: Will the ad get noticed and capture audience attention? And, will it be remembered? These two factors are strongly related.

When we test an ad, we deconstruct it frame by frame and use a simple online Picture Sort technique to identify both the moments in the ad that did the best job of capturing audience attention and which images are the stickiest in memory. This data is usually collected about 10 minutes after ad exposure and can be collected on a smartphone.

The memory map (aka "flow of attention") of an ad video looks like a musical score, with pictures plotted on the staff instead of notes. The height of the pictures on these graphs represents how memorable each image is.

As you can see in Figure 1, after just a very short time, the working memory system has already sorted the images from a test ad into a hierarchy of importance. The graph shows the results of a simple experiment (replicated five times) where matched samples of consumers were shown the same ad 20 minutes after ad exposure, 24 hours after ad exposure and seven days after ad exposure.

As expected, the average recognition level for the set of images in the ad decays over time, from 77% to 62% to 52%. So, about half the images are still remembered a week after seeing the ad.

But the really interesting finding is the similarity of the contour and connectivity of the three memory maps. As the memories of the ad decay, the rhythmic structure of image-level recognition remains fairly intact over time, with peaks remaining peaks and

Figure 2

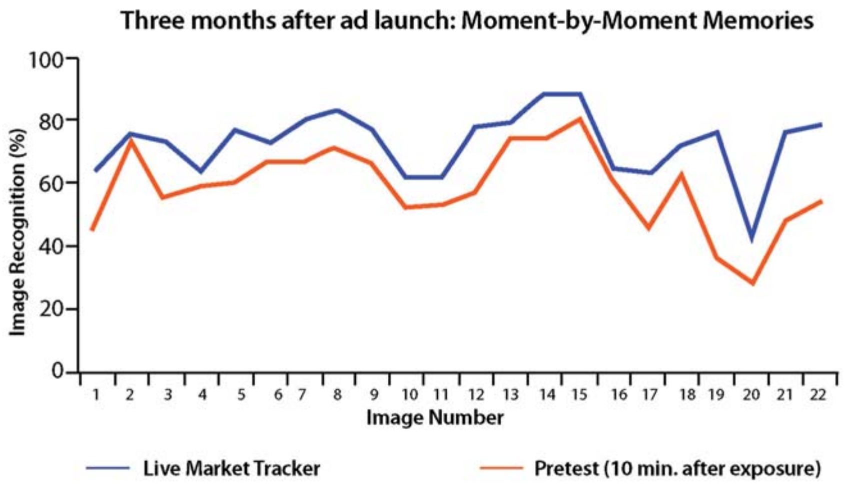
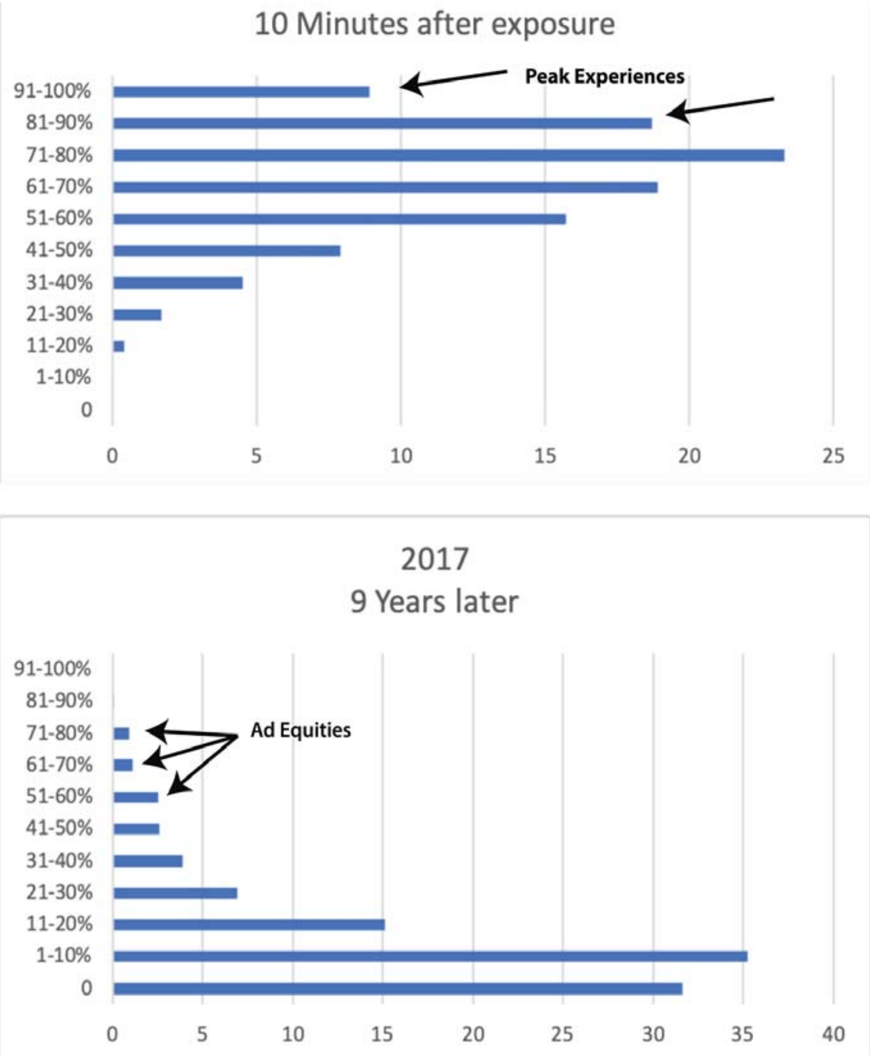


Figure 3



valleys remaining valleys across these different time frames

As an even longer test of memory, we compared the memory map from a pretest, taken 10 minutes after ad exposure, and compared it to the data collected from an in-market tracking study, with an embedded picture-sort question. This data was collected online from the target audience three months after the ad started running live on TV.

As you can see in the graph in Figure 2, the narrative structure of the brand story itself remains intact in memory for a surprisingly long time. The key to driving top-of-mind awareness, and attracting consumer attention, is to create peak, memorable experiences with advertising.

When predicting the attention or engagement scores for an ad, about half the variance in these scores can be explained by a handful of rating statements measuring things like relevant news, entertainment value, relatable situation, etc. The other half can be explained by looking at how the audience filters the visual information in an ad and counting the number of peak experiences created by the ad.

The peak images in an ad, rising to the top of consumer memory afterward, are the buoyant images in an ad and are the ones most likely to push consumer thoughts up from the dark depths of memory into the light of consciousness.

Peaks can contain both new information and emotionally charged images from a brand. Peaks also contain familiar content that has been used in prior advertising, i.e., advertising equities, which are attachment points for attaching new memories to old ones.

In fact, strong new content peaks, packed with emotion and relevant information, are prime candidates to become fresh equities for future advertising if used again in new campaigns.

Submerged structure of brand memories

If top-of-mind awareness of the brand is the part of the proverbial iceberg that sticks above the water, then the bottom-up view refers to the submerged structure of brand memories that floats underneath. These are memories that have been aggregated from past experiences the consumer has had with the brand, including memories from prior advertising.

These submerged memories are the backstory for the brand for new advertising and provide clues to consumer motivations to buy the brand.

So, to push our understanding of branded memory to the limit, as an edge case, a couple of years ago we did a very long-term memory study in the fast-food category. In 2009, we had tested 268 TV commercials in the category, across 17 brands. Our question was: How many of the brand memories created in that year can still be found in consumer memory nine years later?

We began by looking at 4,050 unbranded images that used to measure the memorability of each image 10 minutes after each respondent first saw the ad. Then we retested these same images nine years later, among an additional 5,000 demographically matched category users, to find out which images were still remembered so many years after the advertising ran.

The graphs in Figure 3 show the distribution of how well consumers remember these images at these two points in time. The data from this study confirm that the memory effects of advertising can be quite long lasting. Nine years after exposure, the average recognition level was 12.5%, with only 31% of images getting zero remembering.

Ads that were found to be highly motivating at the time they were tested were significantly more likely to be remembered than images from ads with weak motivation scores, with 16.3% of the imagery from the top quartile of motivating ads being remembered, compared to only 8.4% of imagery from the bottom quartile.

Moreover, this research confirms the importance of emotion in brand-building. Imagery found to be highly charged with emotion at the time of testing (self-reported emotions from our Flow of Emotion sort) were also better remembered. For the strongest quartile of emotional imagery, 17.2% of the images were remembered, compared to 7.6% from the weakest quartile.

The key point here is that not only are long-term ad memories plentiful, they are also predictable. The peak memories of an ad, identified only 10 minutes after first exposure, are highly correlated with the memories that can still be found in consumers' heads many years later.

The several top layers in the bottom half of the graph are the gold – the memorable imagery from past advertising has been transmuted into brand equities that can be leveraged in future advertising executions to build a stronger bridge between the past and the brand's future.

Finally, brand memories are not distributed evenly across different segments of the media audience. In this age of micro-targeting, it is important to understand the differences in the brand's equity across different segments in order. You can actually look at the pictures to see the memory equivalent of a brand Instagram feed for each consumer segment.

Measure of winning and losing

In sum, top-of-mind awareness is the top-down view from the executive suite – it gives you a simple weekly or monthly report card measure of winning and losing in the battle for the consumer's mind. And at the bottom of memory is the view from the solid ground on which brands can build future growth. All of which tells us that those of us who play the long game of advertising are, at the end of the day, memory makers.

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••• media research

Netflix and BritBox and Amazon, oh my!

What do users think of the streaming TV choices in the U.K.?

| By Hannah Lendrum

snapshot

Using an analysis of online conversations, Hannah Lendrum offers seven takes on the current state of U.K. streaming TV.

2019 was an interesting year for streaming in the U.K. Netflix remains huge as we enter 2020 but Amazon Prime Video continues to grow and new players such as BritBox and Disney+ pose a potential threat to established services. Looking back at online conversations about streaming over 12 months, the Social Intelligence team at Join the Dots | InSites Consulting identified seven "must-knows" for media brands in 2020.

1. Netflix dominates by a long way

Based on Twitter and forum conversations in 2019, Netflix remains dominant in the market and not yet threatened by established or emerging streaming services: 71% of online conversations about streaming services over the last year referenced Netflix – five times as many as the next platform (Figure 1).

"Netflix and chill" entered common parlance a few years ago and the way people talk about Netflix continues to prove how far it has penetrated public consciousness. Unlike other services, where people tend to reference watching specific shows, Netflix is the only platform where the act of "watching Netflix" is an activity in itself.

"In bed with a takeaway watching Netflix. We've turned into slobs and I love it!"

Similarly, Netflix is the only streaming service so established as to be used as a punchline, from asking when Netflix will produce a "Brexit saga" series to fast-forwarding Parliament on live TV.

"Laughing at Trump and his impeachment but you just get that feeling that Boris Johnson's reign will end on a similar theme in 5 years. And you know Netflix are going to email me with their new doc series about this in 2040."

www.quirks.com/articles/2020/20200314.aspx


lrw

Figure 1

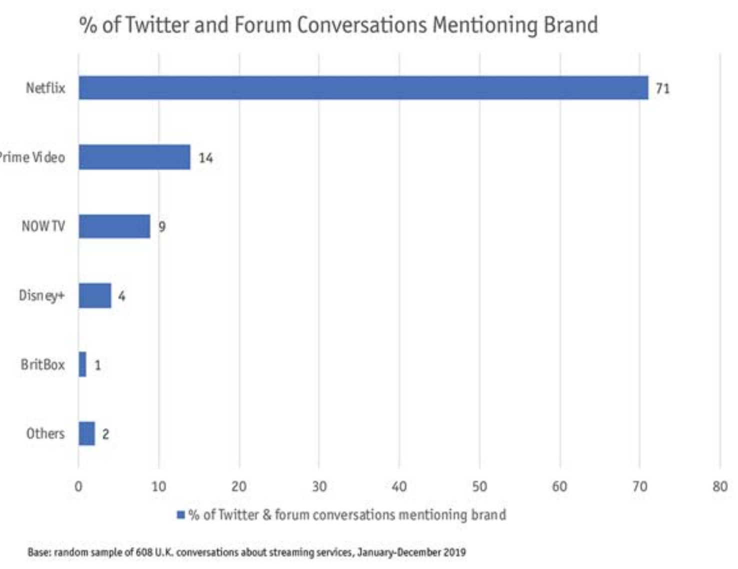
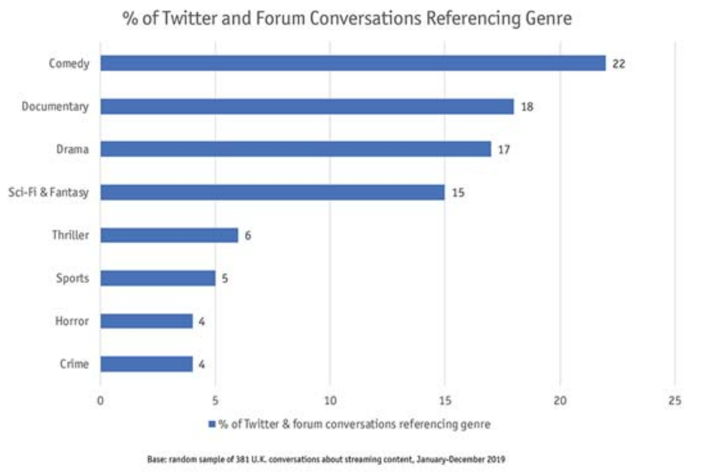


Figure 2



After Netflix, Amazon Prime Video was the second-most talked-about service last year, although conversation volumes were significantly lower. However, certain shows such as Good Omens, The Boys and Lucifer (shared with Netflix) generated buzz for Prime, as well as the launch of the service's Premier League livestreaming.

2. Content doesn't matter if your platform doesn't work

When it comes to streaming, content was, of course, the most-talked about topic. Sixty-six percent of conversations referenced a specific show, film or livestream. However, for certain services (most notably NOW TV), issues with functionality got in the way of people enjoying content, with many taking to Twitter to complain.

For some, issues with functionality even overshadowed the Game of Thrones finale, one of the biggest TV events of 2019.

"My NOW TV account stopped working! stayed up until 2am so I could watch game of thrones and now I can't even wtf"

Issues with basic functionality can trigger people to cancel subscriptions to services, even when they like the content. Good service is a basic requirement for a streaming platform and one that is well worth investing in.

"How come for the past few weeks my access to Now TV has been intermittent? I'm fed up of paying for something I only get half of the time!"

In contrast to NOW TV, only 3% of conversations about Netflix referenced functionality. This can be seen as a reflection of fewer functionality issues, as well as a larger content range to talk about instead.

The other main gripe of viewers in 2019 was with content being removed from streaming services without fair warning or shows being cancelled/not renewed. For certain shows this generated a wave of negative comments from fans online. Notable examples included Netflix cancelling fan-favorite One Day at a Time and Santa Clarita Diet and NOW TV removing early episodes of Game of Thrones.

"@netflixUK you are doing my head in. Why do you keep cancelling shows in their early seasons? not sustainable yano. #santaclaritadiet"

3. People talk about TV shows more than films

Of all conversations reviewed, 39% referenced TV series, almost double the number talking about films (21%). Across both TV and film, comedy and documentary were the most-mentioned genres, closely followed by drama and sci-fi/fantasy (Figure 2).

Within comedy we found the most talked-about shows were After Life and Sex Education – two homegrown comedy series on Netflix. The Boys (Prime) and One Day at a Time (Netflix) also generated some conversation. The most popular shows were often those bringing a new spin to the genre, such as The Boys' irreverent take on the cult of superhero, or One Day at a Time's representation of a Hispanic family and LGBTQ characters within a traditional sitcom formula.

The most-mentioned documentaries were The Disappearance of Madeleine McCann and The Game Changers, both on Netflix. Music documentaries also proved a talking point on Netflix, notably Taylor Swift's Reputation, Beyoncé's Homecoming and Motley Crüe's The Dirt. This genre may be a growing source of interest over the next few years. Other TV hits generating conversation included Lucifer (Netflix) and of course, Game of Thrones (NOW TV).

Within film, Marvel and Star Wars were mentioned often, in particular The Mandalorian, which will be available on Disney+ when it launches in the U.K.

What is striking was the sheer number of different shows and films being mentioned, making it difficult to find a real standout of the year. The diversity of content on streaming services can be a double-edged sword – while many are positive about it, some complained of being overwhelmed, of

finding it difficult to choose what to watch or not having enough time to keep up with new additions.

"I really hate spending ages scrolling through content on Netflix and Prime looking for something to watch. If Apple can solve that then they are on to a winner."

The sheer range of content on streaming services also means that fewer people are watching any given show at any given time, which reduces the chance for content to go viral. This has already proven to be a disadvantage when compared to linear TV, which tends to be better at achieving virality with a more limited selection of shows, broadcast at specific times.

4. Livestreaming sports is growing in importance

Livestreamed sports were a growing topic of conversation throughout the year as people tuned in to Amazon Prime Video and NOW TV to watch tennis, American football and the Premier League. The addition of Premier League games to Prime was big news. Many welcomed the news, in the hopes it may bring changes to the way the game is currently televised.

"Ngl I'm excited for football on Amazon prime. And I would love them to take over PL football rights if it meant they would stream every match including 3pm kickoffs."

However, the experience was marred for many by slow buffering times and what some saw as a poor picture quality compared to traditional channels.

"Last night when I had the City game on – I saw on Twitter that City had scored before I did watching the game."

Livestreamed sports are only set to grow this decade but this is an area where a good stream quality is absolutely key to enjoyment, making this a clear priority for sports streaming services to invest in over the next year.

5. Buzz is growing for Disney+ but less so for BritBox

In November, fans expressed excitement online about the news that Disney+ would launch in the U.K. in March 2020. Clever content reveals helped add to excitement, in particular the news that the Star Wars spinoff series The Mandalorian will be exclusively available on Disney+, although the prospect of waiting months to stream the show prompted others to explore workarounds for accessing it.

"It amuses me that @disneyplus think I'm going to wait until March to watch @themandalorian because I live in the UK. Nope."

Compared to Disney+, conversation about ITV and BBC's recently launched streaming service BritBox was minimal. Despite some success in the US, conversation this side of the pond was largely negative, with U.K. license payers complaining about the prospect of paying for previously free content.

"A subscription service where I can watch repeats of repeats, and pay for the privilege, in spite of the fact that I already pay a licence fee? Daylight robbery much?"

Despite this, the 30-day free trial was enough to encourage some to dip a toe into the water, with Doctor Who and classic box sets particular draws.

"I'm hiding away from my problems with a bacon buttie and Midsomer Murder. Decided to make the most of 30 free days from Britbox and start from the very beginning of the TV series."

6. Viewers are trying to create a more social experience

One thing evident on Twitter and online forums is that people are trying to create more of a social experience around the shows that they're watching. This came in the form of people asking their network for content suggestions, highlighting the importance of peer recommendations.

"Looking for a new series on Netflix to watch. What has been your favourite recent release?"

People also shared content they'd watched, and tried to generate discussion around it.

"Is anyone else watching You Me Her on Netflix? ????"

While some platforms are experimenting with peer recommendations (e.g., "what people are watching in your area" or "people like you watched…" lists), there has been no real move to incorporate social features or recommendations based on friends, into platforms yet. It will be interesting to see if this changes in 2020, particularly with the growth of services that have a more focused content stream and where users may have more in common with each other.

7. Those with multiple subscriptions may start to cut down

With the streaming market fragmenting further, some viewers started to worry about the rising cost of having multiple services and considered cutting down their repertoire, with two or three seeming the max for many.

"As much as I'd like to get Disney, not sure I can afford ANOTHER streaming service. I've got Netflix and Amazon but that's enough. Probably get rid of Amazon as the video service isn't great. But it's the creeping £10 a month for multiple services that gets you."

This hints at a lack of loyalty when it comes to streaming services – we saw people talking about switching if the functionality wasn't up to par or the content range wasn't refreshed often enough. Streaming services will need to be competitive on all fronts to keep subscriber numbers up, especially as newer platforms start to take content back from the current big players; one Twitter user described Netflix as looking "bare" if it loses its rights to both Marvel and BBC content.

"My real question is, will #BritBox result in the removal of BBC shows from Netflix? With everyone creating their own streaming services now, Netflix is looking a bit bare. I'm looking at you, Marvel."

Ensure a healthy mix

In the short term, services will need to ensure a healthy mix of exclusive content and/or original programming but must also be aware that in the longer term, consumers may grow increasingly dissatisfied with content dispersed across different platforms and that the appetite for aggregated services is likely to grow.

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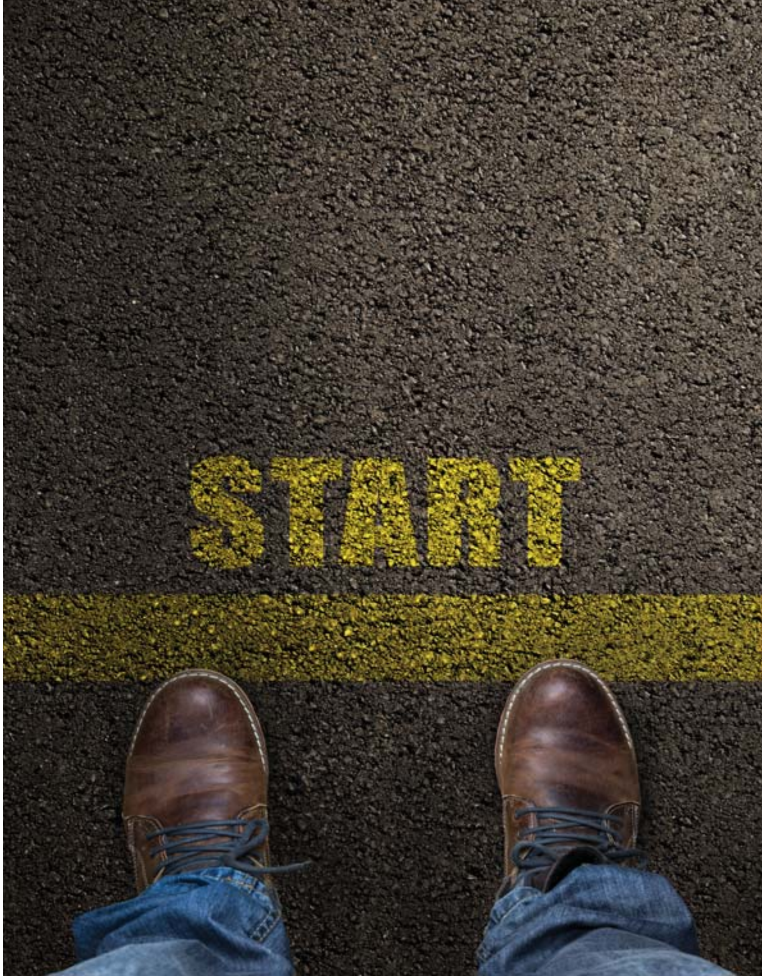
••• the business of research

First things first

Researchers, the question you need to answer is: What question do you want to answer?

| By Adam Warner



snapshot

The importance of starting your research project with clearly defined goals

Every research client wants their results ASAP. However, the key to a successful research project is not a quick start but a smart start. Preparation is critical. Before jumping in with both feet, first things first: What question do you want to answer? What problem are you trying to solve?

It's tempting to jump right in and skip over this step. Don't.

Albert Einstein has lots of wonderful quotes attributed to him but this was of his best: "If I had an hour to solve a problem, I'd spend 55 minutes thinking about the problem and five minutes thinking about solutions." This is often the opposite of what we do as marketing research consultants. We want to figure out the solution even before we get started. Now, there's nothing wrong with being ambitious but it's important to define the problem and create a thoughtful business issue/question BEFORE trying to figure out a solution. (Please note: In this article, we sometimes refer to the key business issue, question or problem interchangeably.)

We often see both clients and researchers hustle to get a project underway before aligning on the key business issue. This is a recipe for disaster. Without a clear question to guide the research that all key stakeholders agree upon you'll get suboptimal results. In addition, you'll often be dealing with a moving target in terms of objectives because you didn't align on a key question at the outset.

At Seton Hall University, we conduct about 15-18 real-world marketing research projects each semester. Students in a marketing research course partner with businesses to address a specific business challenge. At the kickoff meetings, the first step for each team of students and their business partner(s) is to align on a key business issue.

Sounds easy, but often it is a significant challenge to get the group on the same page with a focused business issue or question. Everyone is so anxious to get started and figure out "the answer" that they don't always take their time on this important initial step. Typically, the first attempts at creating a business issue usually yield a very non-specific question, one that

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doesn't provide the focus needed for a successful project.

Start brainstorming

When kicking off a project and trying to develop a focused business issue, we use giant Post-it Notes and big markers. Stick the Post-its on the wall and start brainstorming with all the relevant stakeholders to formulate that key question. This way everyone sees the question as it's being developed and the iterations it goes through. Once you have a solid, first-pass attempt written, then revise, revise and revise some more until everyone says "YES, that's it!" Then hold hands with your team and clients and sing Kumbaya. (The holding hands and singing Kumbaya part is optional. But if it helps…)

Here's a painting analogy for you. Think about painting a room in your home. Anybody can paint! You just hold the brush, dip and paint. It's easy, right? Wrong! Preparation is needed for a successful paint job. You've got to move the furniture, cover electrical outlets, buy the proper paint and brushes, test the color, etc. Skip these steps and you're asking for problems.

Preparation is key for a successful research project as well. Some other important things to do during that upfront stage of your project:

- **Background**. Understand your client, their industry and competitive landscape.
- **Past info**. Review any relevant data or history.
- **Resources**. Identify resource constraints.
- **Next steps**. What will the decision-maker(s) do with the information?

So now you've reviewed these topics with your clients, done your due diligence, gotten the appropriate background and asked lots of questions. Assuming you've already created that initial issue, then it's time to revisit it. Take your time and fine-tune that key business issue/question. Prioritize. Ensure that your market research team is on the same page with your clients (internal or external).

Remember: This key business question really needs to be right on target. Don't just develop objectives, actually create a single guiding question in partnership with your clients. Look at it again. Beat it up. Make it a great question that everyone can align on. Do a gut check. Ask your clients: "If the market research answers this question, will that be a home run?" If not, go back to the drawing board (or the large Post-it Notes) and revise again.

The more specific you are in formulating your business issue/question, the better. Precisely defining the problem you want to solve leads to a better outcome.

Here's a fictitious example to demonstrate the need for specifics when creating a key business issue/question to guide your market research project:

Situation: Jimmy's Pub & Burger has experienced flat sales over the past two years and wants to understand how to grow its business, particularly for the lunch crowd and especially with the local university population.

Key business issue/question attempt #1: We want more business.

Weak. Join the club. Everyone wants more business. You need to be lot more specific.

Key business issue/question attempt #2: Jimmy's Pub & Burger wants more college customers.

Slightly better (but still weak). This is still not a question and needs to be a lot more specific.

Key business issue/question attempt #3: How can Jimmy's Pub & Burger in South Orange, N.J., better understand key drivers of business and grow its lunchtime traffic with the nearby Seton Hall University community?

Much better. Now your business issue is in the form of a specific question. (Make sure your client and your team are fully aligned on an actionable issue before moving onto any next steps.)

One more important upfront item: scope. What is IN scope for your project and, equally as important, what is OUT of scope? Answering these questions at the beginning of a research project is crucial and can save anguish down the road. When a client has multiple objectives in mind, it's important to have a candid discussion about what is feasible and what isn't.

Another expression I love that can be related to the importance of prep work in a market research project: Don't try to boil the ocean. In other words, FOCUS.

We all love our clients and their "challenges," right? However, typically, just like you, clients are juggling many balls at one time. They've got high hopes a research project will find that magic bullet to provide "The Answer" to their business challenges. That's great. However, it's critical to focus. Don't try to boil the ocean by attempting to accomplish too much with a single project. You don't want to overpromise and underdeliver. Make sure your project goals are clear and attainable. Deliverables and recommendations are valuable to clients when they are actionable. Don't lose sight of this!

To illustrate further, wouldn't we all love to deliver a market research project that does the following?

- Fixes the client's website
- Improves their social media outreach across multiple platforms
- Enhances messaging and communication to attract new customers
- Develops tactics to make current customers more frequent users
- Creates strategies to differentiate the client's products/services from competitors

Yes! That would be a great project indeed! However, it is highly unlikely that a single project could accomplish all of these objectives. So … be sure and FOCUS.

Will Leopold, a friend, market research colleague and member of our Seton Hall University Market Research Center advisory board, reminded me of another wonderful expression: "Measure twice and cut once." Time and money are precious commodities when conducting a market research project and you don't want to waste either. I had heard "measure twice and cut once" previously when conducting tele-depth interviews with orthopedists and neurosurgeons about surgical saws. Makes a lot of sense. Do-overs are not good in surgery OR market research.

Pay dividends

Take care of the key upfront prep work BEFORE starting your market research project. It will pay dividends in the end!

To recap, remember:

- First things first: Realize the prep work is critical to the success of a project. Don't shortchange the process by skipping ahead or rushing through this key step.
- What question do you want to answer? Take your time and develop the specific question you want the research to address. Get everyone on the same page BEFORE kicking off your project.
- Specifics: Be specific when developing your key business issue/question. More specific = better!
- Focus: Don't try to boil the ocean. With your clients, align on what you want to accomplish in the project and what's in and what's out of scope.

Adam Warner is the director of the Market Research Center at Seton Hall University, South Orange, N.J., a marketing professor and president of marketing research firm Warner & Associates Consulting. He can be reached at adam.warner@shu.edu.

DIY on a new high?

Client-siders self-assess their departments' DIY success

| By Tim Davidson

snapshot

A study found that DIY research is tops in value but satisfaction is slipping.

For the past 14 years my firm, Prevision Surveys, has conducted research-on-research studies of buyers of market research regarding their satisfaction with the suppliers they used in the prior year. These are structured telephone interviews of research buyers in all major non-government industries in the United States.

Each year we tabulate the 290-300 interviews and produce average scores for each provider mentioned. These averages are computed for seven research categories (e.g., early-stage concept screening, later-stage concept/product tests, A&U studies, ad copy testing) and for seven attributes (overall satisfaction, data quality, analytical skills, communication skills, on-time delivery, other customer service attributes and value-for-money).

During the interviews, respondents often mentioned that some research was conducted by their own staff rather than by hiring an outside researcher in the prior year. Prevision then asked the respondents to put on their "objective hat" and rate their departments' do-it-yourself (DIY) work in the same manner as their ratings of outside contractors.

Bolster internal decision-making

Motivated by the success of mid-20th century survey sampling and polling techniques of George Gallup, creator of the Gallup Poll, staff in the marketing departments of prominent CPG companies first conducted marketing research using their own staff to gain insight from their customers/consumers to bolster internal decision-making. Soon specialty groups within these marketing research departments (MRDs) were created to take on this labor-intensive work. Then new specialized outside firms emerged to do the time-consuming fieldwork and tabulation of research results.

Eventually, independent custom quantitative market research providers expanded their services into six tasks, once done exclusively by in-house staff: assisting in research design; question-

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naire development; fielding the survey; coding and tabulating the findings; reporting of the tabulated results; and developing relevant insights around the marketing/sales decisions to be made.

The most recent Prevision quality/value study covering 2018 found that there are well over 250 medium-to-large MR providers operating in the U.S. that provide virtually all of the above quantitative research tasks. A decade ago, most of the custom quantitative and qualitative research needs of U.S. industry were provided by market research firms and few DIY projects were performed. Gradually, more and more client-side firms resumed some MR project work with their own staff (employing specialized survey software) without the help and expense of outside providers. This in-house activity is referred to as do-it-yourself research.

Several years ago, when MR department budgets were under new economic pressures, many respondent firms increased their use of DIY for certain research projects by doing all six research tasks discussed above with in-house staff only, without any help from custom quantitative or qualitative MR providers.

Many DIY-using firms purchased lists of respondent e-mails and employed online survey software. More recently, wider-ranging online research platforms (equipped with tools like survey software, questionnaire templates, tabulation/reporting aids and respondent panels) have become very popular for assistance with DIY tasks.

Prevision found that in 2018, 80% of respondents used DIY approaches to some extent, up from 71% just two years prior. The rest used no DIY and relied solely on outside help by directly hiring MR providers or marketing research consultants.

Of those respondents that used DIY for some of their projects in 2018, 20% used DIY for up to 5% of all their custom quantitative and qualitative research projects. In contrast, 16% of respondents (up from 7% in 2016) used DIY for more than 70% of their research projects.

A sample of 95 DIY-using respondents claimed that their department conducted more than 1,400 DIY projects in 2018. Forty-two percent of these firms expected the number of DIY projects to increase for 2019 and an equal number said it would stay the same. Only 5 percent expected the DIY project count to decrease.

Bragging rights

How does DIY compare to professional researchers for research quality and value? And how do these DIY attribute ratings compare with DIY ratings in the prior study year? The 2018 study found that if DIY were an independent MR provider, it would have the bragging rights regarding the seven study attributes shown below.

Among the 230 MR buyers rating DIY custom quantitative research projects in 2018:

- For the overall satisfaction study attribute, DIY would rank 10th (vs. sixth in 2017). (That is, in the 2018 study, there were nine professional MR firms that had higher overall satisfaction average scores than the average score for DIY research. Further, DIY's overall satisfaction ratings are slipping from year to year. There were five fewer professional MR firms having better overall satisfaction ratings in 2017 than in 2018.)
- For data quality, DIY would rank 11th (vs. 12th in 2017).
- For analytical skills, DIY would be in eighth place (vs. ninth in the 2017 study).
- For written and verbal communication skills, DIY would rank seventh, (unchanged in its 2017 ranking).
- For on-time delivery, DIY would rank eighth, ranking unchanged.
- For other customer service attributes, DIY would rank fifth vs. sixth.
- For value-for-money, DIY would be in first place, unchanged from 2017 but statistically tied with two independent research providers.

Why does DIY seem to be the best value? Many respondents only considered the out-of-pocket costs of DIY research (e.g., software fees, platform and panel charges, etc.) without counting the salary and other employee-related expenses of in-house staff performing the DIY work. Prevision found, however, that some respondent firms hire new MRD staff exclusively to prosecute DIY projects. Others expect existing staff to spend a substantial part of their time doing DIY work. Clearly, if the cost of labor and overhead were included in DIY research project costs, DIY would likely lose its first-place position in the value-for-money attribute.

High and growing

The quality and value of DIY is clearly high and growing in the eyes of survey respondents for certain types of market research studies. The 2018 study found that if DIY were an independent MR provider, it would have the following ranks regarding the overall satisfaction attribute:

- For early-stage concept screening, DIY would rank fourth in overall satisfaction, up from seventh in 2017.
- For later-stage concept and product testing, DIY would be fifth, up from sixth in 2017.
- For attitude and usage studies, DIY would be fifth, down from third in 2017.
- For customer satisfaction studies, DIY would be third, up from fifth in 2017.
- For ad copy testing, ad/brand tracking studies and brand equity/market structure work, DIY was rarely used.

DIY is commonly used for concept screening and concept testing, where confidentiality is essential; and for attitude and usage testing and for customer satisfaction/loyalty measurement when the project objectives and research design are simple. DIY is not thought to be appropriate for certain more complex types of research studies (e.g., brand equity/market structure, segmentation and other modeling studies) or where specialist MR providers are common and inexpensive (e.g., for ad copy-testing and long-term ad- or brand-tracking studies).

'Partial DIY'

Another strategy to reduce out-of-pocket research costs is also employed by 12% of respondent MRDs. These "partial DIY" respondent firms outsource fielding the survey and tabulating of the survey responses, leaving the four remaining research tasks to the in-house staff. The study found that most MR consultants use some MR suppliers as field-and-tab shops because consultants are normally expected to develop the questionnaire and come up with the insight as part of their own services to their clients. (MR consultants represent less than 10% of the survey respondents.) DIY and partial DIY using field-and-tab shops may also be employed when the subject of the research is to be kept as confidential as possible, as in new product concept screening and testing.

Since the advent of internet-based research and the easy access to specialized survey software applications, many more market research departments have been motivated to do their own studies. Those firms that do not manage their own panelist/customer lists often buy e-mail lists of potential survey respondents from panel suppliers for online DIY survey projects. Further, some firms hire panel suppliers to also manage their own proprietary customer/prospect lists.

In the 2018 study, 78 respondents mentioned and rated 24 panelist/platform suppliers. Dynata (formerly Research Now SSI) led with 23% of the ratings, followed by Qualtrics with 11% of ratings. Of the two leaders, Dynata had higher attribute scores. These two firms, plus ZappiStore, C Space and Vision Critical, represented over 50% of the mentions. Honorable mention goes to ZappiStore for its high overall satisfaction and value-for-money scores.

By far the most frequently mentioned software products to assist respondents with DIY online surveys are Qualtrics and SurveyMonkey. Together they represent 56% of all survey software products mentioned and rated. Sparq (from Vision Critical), SPSS and SurveyGizmo had substantially fewer mentions. Survey respondents also identified 12 more software products, five of which were mentioned only once.

Of the two most popular survey software products, Qualtrics had the higher score in overall satisfaction (4.20/5). SurveyMonkey received the highest value-for-money score (4.67/5) in 2018. (These same software products may be available for use on a web-survey platform as well as on the personal computers used by DIY researchers.)

Clearly on the rise

DIY research use is still clearly on the rise, having been reported more in 2018 than in any earlier study year. The number of DIY observations was 73% more than of the prior year (288 vs. 166). Prevision's Gold Index (GI) is the sum of the average attribute scores indexed to 1,000. Only five major MR providers of custom quantitative market research in the U.S. have higher Gold Index scores than that of DIY. Conversely, an equal number have lower GI scores. The Gold Index for DIY (847/1,000) is five points higher than that of all providers and is like that of the previous year. But DIY has a lower score than the average scores of all providers in five attributes: overall satisfaction, data quality, analytical skills and on-time delivery. Understandably, DIY's value-for-money score tops that of any other research provider because survey respondents do not often factor in the salary cost of in-house staff used.

Tim Davidson is president of Prevision Surveys, Marshfield, Mass. He can be reached at tdavidson@previsionsurveys.com. Interested readers can receive a copy of the most recent study by e-mailing the author. Prevision is also seeking respondents for the current study, who will receive a copy of the respondent report when it is tabulated later this year.

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20 | 20 Research

Founded 1986 | 167 employees
Ross McClean, Vice President, Mobile Qualitative

20|20's mobile ethnography solution, Over the Shoulder, gives you an authentic look directly into the experiences of your consumer, without interrupting their natural environment. It's a flexible and convenient way to gather the in-the-moment insights and stories you need, allowing you to ride in the pockets and purses of your audience for days, weeks or even months. Designed specifically for the smartphone, our platform delivers an unmatched participant experi-

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www.2020research.com

Beall Research Inc.

Founded 2003 | 12 employees
Anne E. Beall, Ph.D

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Phone 1-312-384-1214
Beallrt.com

Creative Consumer Research

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

Creative Consumer Research (CCR) is the most respected public opinion source, providing accurate and actionable information to develop strategic solutions. Using proven techniques, we collect high-quality data for a variety of industries including B2B, health care, consumer goods and more. If your business requires bilingual research, we proudly staff a team of experienced market researchers fluent in spoken and written English, Spanish, Vietnamese, Chinese, Farsi and more. Whether your focus is on the United States or abroad, CCR can program and host your surveys online, whether you need pre-screeners or even a combination of telephone and web interviewing. Our resources allow us to thoroughly conduct studies quickly and inexpensively – no matter what the size. Maximize your business with the CCR market research and consumer insights team.

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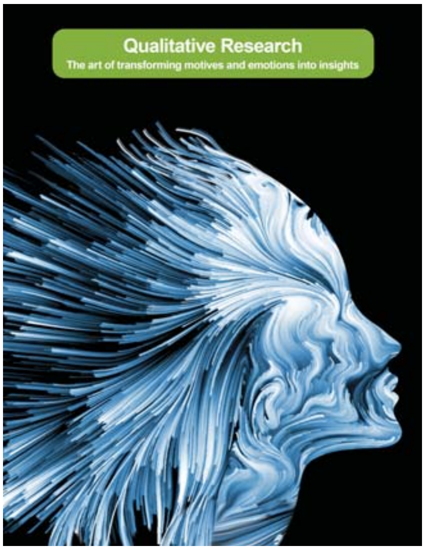
Decision Analyst Inc.

Founded 1978 | 150 employees
Jerry W. Thomas, CEO



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Founded 2017 | 12 employees
Christy Harper, Managing Partner and
Monica Snideman, Managing Partner

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Founded 1990
Vinny Stolo, Director of Operations

Ethnographic recruiting is a particular specialty of National Field & Focus. Now in our 30th year of serving the data collection and focus group facility needs of the Greater Boston area, we have recruited thousands of panelists for in-home and in-office ethnographies as well as shop-alongs from a broad spectrum of consumers, businesses and medical professionals. Certified as a woman-owned business, National Field & Focus also offers the ability to conduct in-facility ethnos using our specialized sink and mirror rooms, allowing client observation of activities typically performed at a bathroom vanity such as grooming, makeup routines, fragrance tests, face washes and hair care. For Boston ethnographic recruiting, make NFF your first choice!

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Schlesinger Ethnographic Solutions

Founded 1966 | 1,000 employees
Chawntae Applegate, SVP, Client Solutions

Get up close and personal to listen, observe and probe research participants as they go about their routines. We recruit and support in-home, in-office or on-site immersions as a standalone solution or as a mixed method. We ensure participants are on-spec, cooperative and comfortable with the method and any technology. Our comprehensive project management support includes recruitment of main and peripheral participants pertinent to the study, shipping of test products and instructions, homework assignments, client packs (car service, food, maps, etc.), professional videography and highlight reels, and even mobile streaming of filming. Our consultative approach and uncompromising commitment to your success set us apart. Contact Chawntae at Chawntae.Applegate@SchlesingerGroup.com.

Phone 1-513-284-3265
SchlesingerGroup.com

Shapiro+Raj

Founded 1955 | 80 employees
Zain Raj, CEO

Shapiro+Raj's rich history with ethnographic research started over sixty 60 years ago when we invented methodologies that replaced poll-oriented research based on social and behavioral sciences. We have done over 500 ethnographic projects in the past five years for clients in a diverse set of industries including pharma and health care, retail/grocery, home improvement, CPG and services. As the sixth-largest independent insights and inspiration company in the U.S., our next-gen methods dig deep to unlock market-ready insights, which our brand planners turn into strategic marketplace actions. Empowered by a world-class tech stack, we've helped clients reinvent the rules of their categories. All with one imperative – impact behavior to drive sales.

Phone 1-312-965-2319
www.shapiroraj.com

Smarty Pants

Founded 2005 | 30 employees
Stephanie Retblatt, EVP | Alisha Snow, EVP

Smarty Pants is a full-service research consultancy that delivers transformational insights and solutions to the world's best marketers. The award-winning team of moderators, ethnographers and quant savants excels at primary research, consumer journeys, co-creation, evaluation and tracking, brand positioning and trend research. The firm is known for its life-stage expertise and youth and family savvy. Global leaders in tech, CPG, auto, toy/game, apparel, retail, health care, food/beverage and entertainment rely on the firm for impeccable fieldwork, best-in-class thinking and stellar deliverables. The woman-owned business conducts research in 60 countries and has U.S. offices in New York, Boston, Philadelphia, Los Angeles, San Diego, Denver, Tampa, Fla., and Johnson City, Tenn.

Phone 1-203-847-5766
www.AskSmartyPants.com

SunResearch

Founded 1995
Ava Lindberg, PhD, President

SunResearch specializes in deep dives through mixed methods, blending cultural ethnography, digital and Jungian-centered qualitative to illuminate the complexity of consumer needs. Reveal – Authentic ethnography starts with live observation conducted by the cultural anthropologist and trained team, observing participants' natural behavior in authentic real-life universes on cultural, behavioral and emotional levels. Magnify – A second phase identifies daily life portrayed in online platforms with selected consumers for two to three weeks. Crystallize – The third stage is psychological IDIs exploring Jungian archetypes using a mythic approach to unearth the DNA of segments and brands. Interpretation and presentations highlight findings and implications.

Phone 1-203-454-9939
http://www.suninsights.com

TecEd Inc.

Founded 1967 | 6+ employees
Stephanie Rosenbaum, CEO

TecEd performs field research for B2B and B2C clients in industries including health care, IT services/computer security, automotive, consumer electronics, K-12 and networking/telecommunications. Only senior researchers support our clients! Deploying ethnographic interviewing and contextual inquiry methods from psychology, anthropology and sociology, our researchers learn how diverse users' contexts influence their needs and preferences for applications and products. Observing people in their own environments also provides key insights to define new product initiatives. Ethnographic field research – including recruiting the right target users – can be part of a multi-phase user research strategy that TecEd designs to help our clients create successful user experiences.

Phone 1-734-995-1010, x704
www.teced.com

CALENDAR OF EVENTS

••• can't-miss activities

KNect365 will hold its ePharma Impact event **March 18-19** at the New York Hilton Midtown in **New York**. Visit https://bit.ly/2PcsciW.

IQPC will hold its Customer Contact Week Executive Exchange event on **March 22-24** in **Miami Beach, Fla.** Visit bit.ly/2kyNbku.

The **Merlien Institute** will hold its Qual360 NA event on **March 24-25** in **Washington, D.C.** Visit na.qual360.com.

KNect365 will hold its Marketing Analytics and Data Science – West event on **March 31 - April 2** at Hotel Kabuki in **San Francisco**. Visit bit.ly/2hpc3E6.

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

Quirk's will hold its 2020 Quirk's Event – Chicago on **April 6-7** at Sheraton Grand in **Chicago**. Visit thequirksevent.com.

Women in Research (WIRe) will host its 2020 Closing Night Reception for the Quirk's 2020 Event on **April 7** in Chicago.

The **Advertising Research Foundation** will hold its AUDIENCExSCIENCE 2020 conference on **April 19-22** at the Hyatt Regency in **Jersey City, N.J.** Visit bit.ly/2kY3EiE.

IQPC will hold its CX Exchange for Retail event on **April 21-22** in **London**. Visit bit.ly/2l7EE8o.

The **Population Association of America** will hold its 2020 Annual Meeting on **April 22-25** in **Austin, Texas**. Visit bit.ly/25wns9T.

Intellus Worldwide will hold its 2020 summit on **April 29 - May 1**. Visit bit.ly/2RDXQov.

KNect365 will hold its FUSE 2020 event on **May 4-6** at the Encore Boston Harbor in **Boston**. Visit bit.ly/2vpiqRB.

AAPOR will hold its 2020 Annual Conference on **May 14-17** at the Hilton in **Atlanta**. Visit bit.ly/2ouuwVL.

LIMRA will hold its 2020 Marketing Conference on **May 27-29** at Caesars Palace in **Las Vegas, Nev.** Visit bit.ly/2quzGSv.

The **American Statistical Association** will hold its Symposium on Data Science and Statistics on **June 3-6** at the Westin Pittsburgh in **Pittsburgh**. Visit bit.ly/2HutJN2.

we.CONECT Global Leaders GmbH will hold its CiMi.CON Evolution EU event on **June 15-16** at the Maritim proArte Hotel in **Berlin**. Visit competitive-market-intelligence.com.

we.CONECT Global Leaders GmbH will hold its Pharma CiMi.CON EU event **June 15-16** at the Maritim proArte Hotel in **Berlin**. Visit pharma-competitive-intelligence.com.

The **Merlien Institute** will hold its MRMW EU event on **June 16-17** in **Amsterdam**. Visit eu.mrmw.net.

IQPC will hold its Customer Contact Week event on **June 22-26** in **Las Vegas**. Visit bit.ly/2DoygRE.

Worldwide Business Research will hold its eTail Europe event on **June 23-24** at the Queen Elizabeth II Conference Centre in **London**. Visit bit.ly/2Sg9NWB.

Worldwide Business Research will hold its Digital Food & Beverage 2020 event on **July 20-22** at the Hilton in **Austin, Texas**. Visit bit.ly/2yY1xim.

KNect365 will hold its Insight Leadership and Talent Summit **July 21-23** at the Encore Boston Harbor in **Boston**. Visit marketing.knect365.com/consumer-insights.

KNect365 will hold its Summer Insights Fest **July 21-23** at the Encore Boston Harbor in **Boston**. Visit marketing.knect365.com/summer-insights-fest.

KNect365 will hold its UX Research and Insights Summit **July 21-23** at the Encore Boston Harbor in **Boston**. Visit marketing.knect365.com/ux-research-insights-summit.

Worldwide Business Research will hold its eTail Boston 2020 event on **August 10-13** at The Sheraton in **Boston**. Visit bit.ly/2GhsVMw.

The **Merlien Institute** will hold its MRMW NA event on **September 30 - October 1** in **Atlanta**. Visit na.mrmw.net.

KNect365 will host TMRE: The Market Research Event **October 5-7** at the JW Marriott San Antonio Hill Country Resort and Spa in **San Antonio, Texas**. Visit marketing.knect365.com/tmre.

The **Merlien Institute** will hold its MRMW APAC 2020 event on **November 17-18** in **Singapore**. Visit apac.mrmw.net.

The **Merlien Institute** will hold its Qual360 APAC event on **November 17-18** in **Singapore**. Visit apac.qual360.com.

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.

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10 minutes with...

Jessica Irwin
Director, CMI Consumer Group, Verizon

"It takes a lot of confidence to admit you don't know something but that is what helps you continue to grow as a researcher and a leader."

Do you have any tips for researchers who are struggling to adapt to the constant change within the marketing research industry?

I believe it is really important to continue to learn new skills and be open to new and different ways of doing research. That requires us to be humble and admit that we may not always know everything about everything. It takes a lot of confidence to admit you don't know something but that is what helps you continue to grow as a researcher and a leader. We also have to hire people with different skill sets from our own and be able to work with different types of researchers with mutual respect for each other's specialties.

What is the most important skill to look for in a new MR hire?

Resourcefulness. It is so important to be able to do things proactively and be able to figure things out independently. And, of course, a great aptitude for uncovering the why as well as how facts and findings and hypotheses come together.

When looking ahead to the next five years, what do you think will be marketing research's biggest challenge?

I think it is going to be understanding, accepting and evolving the industry to be inclusive of all kinds of insights – whether it's traditional market research, big data or design research – it all plays a role in understanding the customer and the business. We as researchers have to embrace it all and find a way to work across the different types of data and the different mind-sets.

What new tool, methodology or technology do you hope to use in 2020?

I'm so excited for 2020 – we are building a lot of new capabilities at Verizon. Some other parts of the team are building out a bigger, better futurist specialty and new tracking methodologies. But my team is building on top of our digital store experience to include eye-tracking. In addition, we are expanding our in-house toolkit, so we are leveraging some of the new DIY offerings. And, we are doing research-on-research through our user testing team to leverage neuroscience.

Read the full interview at www.quirks.com/articles/2020/20200322.aspx.