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For marketing research and insights professionals

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Health literacy's impact on doctors and patients

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Using premiumization to bend the rules of pricing

Quirk's Marketing Research Review
September/October 2020
Volume XXXIV Number 5
www.quirks.com

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CLICK WITH QUIRK'S

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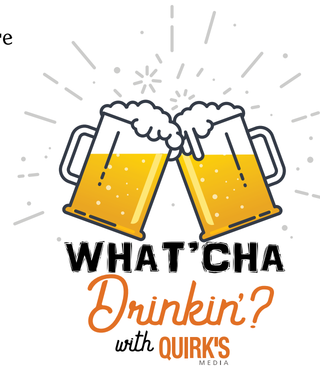
Industry interviews

What'cha Drinkin'? is a series of interviews with marketing research and insights professionals, launched in April 2020. Quirk's continues to have the pleasure of chatting with a variety of people within the community, checking in on some of the following topics: how they are working to manage an ever-evolving global crisis, their role within marketing research and insights and a few fun questions.

To view the latest interviews, visit www.quirks.com/multimedia.



••• events

Quirk's Virtual

Are you looking for ways to expand your MR knowledge this fall? Don't miss The Quirk's Event Virtual: New World, New Tools! This two-day online event, running October 27-28, 2020, will feature high-quality learning sessions from leaders across the industry.

Visit www.thequirksevent.com/virtual to learn more.

// E-newsworthy

How brand empathy can rebuild consumer confidence

quirks.com/articles/2020/20200726-1.aspx

Presenting statistics to non-statisticians

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// Noted Posts

Quirk's Blog

COVID-19: Information and resources: Part 6

bit.ly/3jUtD3M

COVID-19: Survey Monitor: Part 8

bit.ly/30aKfMV

Research Industry Voices

Consumers look for safety before shopping

bit.ly/3go9rpb

Vox Media research looks at its audiences' view of BLM movement

bit.ly/2P8fBgQ

The impact of COVID-19 on women in tech

bit.ly/335cQFj

Research Careers Blog

Engaging employees as brand ambassadors

bit.ly/2DlHgbt

Correcting racial inequity: What should you do?

bit.ly/309nfxL

Anti-oppression: A resource guide for the marketing research industry

bit.ly/33cI4ut

Thriving at work despite the pandemic

bit.ly/3jS0cQ4

••• covid-19

Pandemic shifts purchase drivers from health to happiness

Data from a tracking study conducted by Chicago research firm InsightsNow shows that consumer purchase motivators shifted to satisfy psychological mood lifters and sensorial cravings as the coronavirus pandemic continued. While functional health and safety were found to be important during early stages of the pandemic, those motivators decreased in importance as consumers reported seeking out experiences to change their mood. For example, at the end of June 2020, the study showed 61% of increased consumer product purchases were driven by a desire to lift mood or to satisfy craving for specific sensory experiences, up from 6% in March 2020. Functional health and safety motivators dropped to 54% of increased purchases in late June, down from 84% in March 2020. Social motivators associated with providing healthy alternatives for family members or to respond to recommendations from friends also increased to 44% at the end of June from 24% in March 2020.

Study participants are from the firm's Clean Label Enthusiasts (CLE) consumer research community, with research techniques using proprietary behavioral research frameworks. "Just like the stages of grief, we are now finding consumer behavior to follow predictable stages in motivations," says InsightsNow Chief Research Officer Greg Stucky. "Our COVID-19 tracker has discovered a range of opportunities for CPG companies to launch line extensions and to reposition existing products to align with what consumers are seeking."

www.quirks.com/articles/2020/20200901.aspx

••• e-commerce research

Are daily-deal sites a win for merchants?

A study of the bargaining process between daily-deal platforms Groupon and LivingSocial and merchants found that while merchants may have less leverage and sacrifice certain net profits for the short term when selling their goods or services on the larger platforms, they can win in the long run by adding new customers and creating the opportunity for future sales to a larger customer base.

The research study, Price Bargaining and Competition in Online Platforms: An Empirical Analysis of the Daily Deal Market, was published in the July edition of the INFORMS journal Marketing Science.

Researchers Lingling Zhang and Doug J. Chung found that, while smaller platforms cannot offer access to a consumer market as well as larger platforms, they are willing to leave more room for merchants on profit-splitting. So, the long-term results of working with smaller platforms can be better for some merchants.

"We compared Groupon, the larger online platform, to LivingSocial, the smaller one, and found that LivingSocial can compensate for its smaller size by offering higher share of profit to merchants," says Zhang. "For some merchants, the trade-off works in a way that choosing the smaller daily-deal platform can be an effective way to maximize profits."

By Joseph Rydholm, Quirk's Editor

Great to (virtually) see you!

Back in 2015, with our first-ever Quirk's Event, we sought to bring the same kind of content that the magazine delivers to the live setting. It was a wonderful success and showed that we could pivot from being "just" a media company to a media company that also produced events that captured the tone of our print and digital offerings while adding the immediacy and fun of an in-person gathering.

Our first two events of 2020 – London in February and New York in March – went off without a hitch. And then seemingly just days after we all returned to the office from New York, the world changed as COVID-19's impact began being felt in earnest.

At the time of this writing in early August, it's hard to believe we will ever get back to staging in-person events. Still, after cancelling our remaining 2020 Chicago gathering, which had been scheduled for this summer, we've regrouped for what we hope will be a full 2021 slate, with events in Chicago (June 2-3), New York (July 20-21, moving to the Javits Center) and London (August 17-18).

Throughout the spring we kept hearing from people, "You guys should do a virtual event!" Uhhh, we've never done one of those, we would answer. But then, as so often happens around here, conversations started. What would a Quirk's virtual event look like? How could we re-create some of the fun of our in-person events? Would people even attend if we were able to get one pulled together?

Turns out the answer to that last question was a resounding yes! Our in-house team and our awesome conference-production partners worked feverishly to line up speakers, vet event platforms, build out marketing plans, coordinate with vendors and do the hundreds of other small jobs needed to pull off a multiple-day event. And on July 14-16 we held the Quirk's Virtual Event, drawing nearly 3,000 registrations (including over 1,600 client-side researchers!) and over 2,500 day-of and post-event attendees.

There were certainly some hiccups – promised platform capabilities either worked sporadically or not at all – but the sessions themselves went well. Some were pre-recorded, some were live and even when there were tech glitches, people remained patient and good-humored, likely a product of the many Zoom calls we've all been on in recent months.

During the in-session chats, attendees expressed their excitement to be learning and gathering together (even though it was all virtual) and, along with engaging with the speakers and event sponsors, they shared stories about everything from how their research functions were faring to the weirdness of working from home.

I found the worldwide nature of the gathering particularly heartening – there were many general exchanges of greetings, with people sharing the locales where they were checking in from. That "we're all in this together" attitude encompassed everything from the personal takes on life during a pandemic to the discussions of how COVID-19 has impacted the job of the marketing researcher. (For more on the latter, see our Q Report section in this issue.)

www.quirks.com/articles/2020/20200902.aspx

Joe Rydholm can be reached at joe@quirks.com

Clever and resourceful

There are few, if any, good things to come out of the pandemic but one that I keep returning to is how creative people can be when faced with unexpected challenges. Many of the speakers and attendees at the July conference spoke of clever and resourceful adaptations they've made in response to changing consumer habits, work setups and internal insights needs.

For our part, we learned a lot from the process, just as we did after our first in-person event and continue to do after all of the subsequent gatherings. I'm hopeful that 2021 will bring a return to in-person events, though the virus has shown us that it's unmatched in its ability to remorselessly destroy our plans. But if we do need to rely on a virtual approach again, we now know we can do it and deliver a gratifying experience for our beloved audience.

P.S. We are staging another virtual event on October 27-28 and we'd love to have you join us. Head over to www.thequirksevent.com for more information.

ASK THE EXPERT

Expert answers to important research questions.

How can researchers help health care marketers craft winning value propositions?

Kip Creel
President
StandPoint
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Marketing and selling solutions to health care providers is hard. Health care is a complex ecosystem and most decisions are made by diverse committees rather than individual decision makers. Mapping the ecosystem and pinpointing what each stakeholder values is critical to success.

Let's consider the value proposition. An effective value proposition needs to be tuned to the needs and goals of the customer. The good news is that, from hospital to hospital, those goals and needs are nearly universal. However, each member of the diverse decision-making committee will value different things. Herein lies the challenge for marketing and sales: crafting an umbrella value proposition supported by message tracks that resonate with a diverse group of influencers and decision makers. Cracking this code is make-or-break for marketers. And health care researchers are the key.

For every solution and in every hospital, the acquisition and usage cost will always be evaluated against these four value drivers:

1. Impact on patient outcomes
2. Impact on patient experience
3. Risk to the patient and provider
4. Reduced costs

Patient outcomes means that your solution must make the patient better faster. Similarly, patient experience encompasses the tangibles and intangibles that foster greater word-of-mouth and lead to that doctor or health system becoming a trusted expert. The risks of the new solution for patient and provider will be evaluated against current options.

Marketing touting reduced costs is omnipresent; pinpointing the term's precise meaning is critical because it could encompass acquisition cost, usage costs, maintenance costs, replacement costs, switching costs and more. What is often overlooked and increasingly important is the impact on labor costs and productivity. If your solution clearly saves time and money, the value proposition is strong. Oftentimes, however, the direct cost of new solutions may be higher to the department that is paying for it but could be saving the hospital money elsewhere. Identifying that "somewhere else" is very important.

The goal, of course, is to create enough value where acquisition and usage costs are less of a barrier. While still important, higher costs are justified if enough value is being created in the other buckets: outcomes, experience and reduced risk.

The next step for the researcher is to map out the sales roadmap. For capital expenditures in a single hospital, adoption may be contingent on the commitment of time and money by five or more people. The researcher's mandate is to identify all decision makers, influencers and likely champions. For each member, the marketer will rely on you to understand the resonance of each value driver, identify message tracks to deliver to each person, uncover the necessary content for sales aids and map out the exact steps for the sales team to drive awareness, trial and ultimate adoption.

www.quirks.com/articles/2020/20200955.aspx

// Survey Monitor

••• social media research

Too much or not enough?

Opinions of tech company regulations differ with ideology

A majority of Americans think social media companies have too much power and influence in politics and roughly half think major technology companies should be regulated more than they are now, according to a new Pew Research Center survey as reported by Pew's Monica Anderson.

Overall, 72% of U.S. adults say social media companies have too much power and influence in politics today. Far fewer Americans believe the amount of political power these companies hold is about the right amount (21%) or not enough (6%). Majorities of both Republicans and Democrats believe social media companies wield too much power but Republicans are particularly likely to express this view. Roughly eight in 10 Republicans and Republican-leaning independents (82%) think these companies have too much power and influence in politics, compared with 63% of Democrats and Democrat-leaners. Democrats, on the other hand, are more likely than Republicans to say these companies have about the right amount of power and influence in politics (28% vs. 13%). Small shares in both parties believe these companies do not have enough power.

The survey found some ideological differences within the parties. About nine in 10 conservative Republicans (89%) think these companies have too much power, versus 74% of moderate or liberal Republicans. And liberal Democrats are somewhat more likely than moderate or conservative Democrats to agree with this assessment (68% vs. 60%).

Amid recent concerns about fair practices among tech companies, Americans favor more regulation of major technology companies; 47% of the public thinks the government should be regulating major technology companies more than they are now, while just 11% think they should be regulated less. About four in 10 (39%) believe regulation should stay at its current level.

Similar shares of Republicans (48%) and Democrats (46%) agree that the government should regulate big technology companies more than is currently the case. Democratic support for increased regulation has dropped 11 percentage points since 2018 – by comparison, Republicans' views overall on the issue are about the same today as they were two years ago.

However, ideology is also a factor. The share of conservative Republicans who believe these companies should face more government regulation has increased from 42% to 53% since 2018. At the same time, the share of liberal Democrats who support more regulation of big technology firms has fallen from 65% to 52%. Conservative Republicans are the only ideological group who have become more likely to favor increased regulation.

Moderate or liberal Republicans and moderate or conservative Democrats tend to hold similar views about regulating the tech industry. Today, 42% in each group say there should be more regulation of major tech companies, down from 55% since 2018 among moderate or liberal Republicans and 54% among moderate or conservative Democrats.

The study was conducted by Pew Research Center among U.S. adults from June 16-22, 2020.

www.quirks.com/articles/2020/20200903.aspx

••• generational research

COVID-19 fuels tech use among seniors

Telemedicine is trending

A recent study by healthinsurance.com polled Medicare-eligible respondents ages 64 and older to learn how they're embracing technology, particularly in the time of COVID-19.

The coronavirus pandemic is affecting seniors' daily habits and family life; 38% haven't seen their kids or grandkids in person since mid-March. More than half have put off a dentist appointment because of COVID-19. Six in 10 have only left the house to go food shopping or to the pharmacy. On the flip side, 27% say they have left their house whenever they wanted during the pandemic.

A particular increase in tech use among seniors sprung from the need to meet health care needs during the pandemic. Telemedicine usage has increased by 340% among Medicare recipients since the start of COVID-19. One-third report ordering their prescriptions from an online pharmacy. And tech use for health care reasons extends beyond telemedicine and the internet – nearly one-third of respondents say they monitor their health using a wearable. In fact, four in 10 are interested in a wearable that helps them and those around them maintain appropriate social distance.

Telemedicine is trending among those on Medicare. Prior to COVID-19 only one in 10 used telemedicine. During COVID-19, 44% have used telemedicine and 43% say they intend on using it after. Of those who used telemedicine, 58% say they have used it just once and 30% report using it once a month. Two-thirds of those who haven't tried telemedicine said the reason is simply because they haven't needed the service.

Seniors are staying connected with social networks via technology; 73% are on social media with 83% saying they use Facebook the most. Fifty-two percent say they use social media to stay in touch with family and friends and 21% say they use it to get news.

The usage of video chatting services has risen among this group during the pandemic as well. More than half video chat with their kids and grandkids at least once a month, with 50% saying they video chat more since the start of COVID-19. And it's not just with family – 32% say they video chat with their friends as well.

While 66% of seniors aren't completely sold on cutting cable TV, 75% of respondents say they have a smart TV or use a streaming device, with 47% admitting to binge-watching. And seniors are embracing smartphones as well, with nine in 10 respondents saying they have a smartphone and like to use it. Seventy-one percent say their preferred method of communication is either texting or talking on their cell phone. And it's not just smartphones – two-thirds say they also have some type of tablet. Eleven percent have used the COVID-19 pandemic as a reason to start using a smartphone.

The study was conducted by healthinsurance.com and polled more than 1,000 Medicare-eligible U.S. respondents aged 64+. The study was fielded from July 17-20, 2020.

••• employee research

What does the future hold?

COVID-19 is causing workers to rethink their careers

In its recent study, Understanding Workplace Sentiment During COVID-19, DeVry University looked at how American employees understand their careers during the current crisis. Not surprisingly, many people are rethinking their work and life priorities – according to the study, one in four respondents said they were thinking of changing careers due to COVID-19, with 38% citing a desire to work from home or better work/life balance as their top motivations. Other reasons for rethinking careers due to COVID-19 included job security (13%) and less exposure to illness (8%).

Of those who were employed, 31% were concerned a lack of either hard skills or certifications made them vulnerable to layoffs or would challenge their ability to find new employment. Respondents were almost equally worried about a lack of soft skills or network, with 27% citing these areas of concern. Interestingly, almost half (49%) reported they have no personal weaknesses of concern; they are confident in their capabilities as they relate to keeping or finding a job.

Similarly, 39% of respondents, who were currently working or intending to find work, do not plan on doing anything to boost their confidence in their current career. For the nearly 60% who are planning to take steps to increase their career confidence, the two most common plans included networking (23%), with more men (27%) than women (17%) planning to network, and continuing education (45%), with almost half planning to continue their education by obtaining a certificate, finishing or starting a degree, or pursuing a higher credential (approximately 11% in each subcategory). Very few (11%) planned to seek advice from their current employers, which could indicate a lack of trust or anticipated resources.

The survey was conducted by Engine Insights on behalf of DeVry University and polled 1,004 U.S. adults from April 29-May 1, 2020.

••• consumer psychology

Voting with their pocketbooks

The practice of boycotting is increasing – and conflicting

A substantial percentage of consumers who feel that a company is behaving wrongly are willing to express their disapproval by withholding their dollars, according to a report by CompareCards which found that 38% of Americans – and more than half of Gen Z and Millennials – are currently boycotting at least one company. The number of boycotting consumers is up from 26% in January 2019.

The coronavirus pandemic, coupled with recent protests against social injustice, has caused many consumers to scrutinize the way a company operates and change their spending habits accordingly, from shunning businesses who don't treat their employees fairly to prioritizing the purchasing of Black-owned brands.

Nearly a quarter (23%) of boycotting consumers said the company they're refusing to patronize has been accused of racism. A similar number of consumers said the diversity of a company's executive suite factors into their decision to spend money with that company.

The Black Lives Matter movement and mask requirement create nearly an even split among many boycotting consumers. Nineteen percent of boycotting consumers are refusing to spend money with a company due to its support for the Black Lives Matter movement, while 18% are boycotting companies that do not support the movement. At the same time, 16% are withholding dollars from businesses that don't require shoppers to wear masks but 15% are boycotting places that do require patrons to don face coverings.

The study found that the likelihood of someone boycotting a company decreased with age. About half of Gen Z (51%) and Millennials (52%) are currently boycotting at least one company but that number drops slightly for Gen X (37%) and greatly for Baby Boomers (22%) and the Silent Generation (16%).

More than half (53%) of Americans said they're more likely to buy from a company that gives to charities or is associated with causes they believe in. And 41% said they would cut ties with their favorite retailer if it publicly supported something or someone they strongly disagreed with.

The study was conducted by Qualtrics on behalf of CompareCards and surveyed 1,026 Americans from July 10-13, 2020.

••• small business research

Business unusual

SBOs expect future decreased revenue

In its Small Business Recovery Survey, TD Bank polled 750 small businesses across the U.S. to understand how small business owners (SBOs) are handling the challenges created by the pandemic. More than half (58%) of SBOs report that they expect their revenue to decrease in 2020, even though 47% stated they did not have to close for any amount of time during the COVID-19 pandemic. Conversely, just 16% of SBOs expect to see any increase in revenue in 2020, while 26% project it will stay the same.

The TD Bank Small Business Recovery Survey polled businesses with less than $10 million in annual revenue and 250 or fewer employees. Businesses with annual revenues of $500,000 or less, which comprised 59% of the survey respondents, were more likely than those with higher annual revenues to state that they expect significant 2020 revenue decreases (loss of 10% or more), with 38% of this group making such projections.

Many SBOs have sought assistance. Forty-three percent of survey respondents participated in the Small Business Administration's Paycheck Protection Program (PPP). Of those businesses in the survey that received a PPP loan, 60% have annual revenues of $1 million or less.

Small businesses were ill-equipped

to cope with the challenges of COVID-19, according to the survey. Eighty-one percent of SBOs said they did not have a disaster or crisis plan prior to pandemic shutdowns. Further, 31% of respondents did not make any changes to business operations or strategy to adapt to the circumstances. Of the 69% of SBOs that reported implementing one or more changes, 28% added work from home capabilities, 27% reduced operating hours, 20% temporarily or permanently laid off staff, 18% incurred extra costs for additional cleaning and 13% moved their business online.

What's more, only half of respondents reported making any business adjustments to better serve their customers or clientele, although Millennial and Gen Z business owners (ages 18-39) were nearly twice as likely as Gen X and baby boomer SBOs to make changes to accommodate customers during this time. SBOs who did modify operations for their customers added virtual functions like appointments/telehealth or conferences (25%); created a new delivery or pick-up service (15%); and developed e-commerce/online sales (11%).

SBOs had mixed feelings about their financial outlook and external factors that could affect their business operations. Fifty-five percent stated they will seek funding but just 7% of participants expressed concern about their ability to obtain a loan in the next year. When asked about top near-term challenges, 69% of SBOs pointed to the health of the economy, both national and local; 25% cited getting paid on time or without significant delays of more than 30 days; 24% considered the presidential election and potential regulatory changes; and 21% were worried about supply chain disruptions.

The study was conducted by Engine Insights on behalf of TD Bank and surveyed 750 small business owners in the U.S. from June 5-11, 2020.

••• travel research

On the road again – maybe

Consumers look forward to traveling once again, with some caveats

Not surprisingly, months of staying at home and altering behavior due to COVID-19 has given people the urge to get out and travel. In a recent survey by Oracle and Skift, just over half (51%) of respondents in both North and Latin America plan to book trips in the next six months, while 38% of those in Asia-Pacific and Europe are planning getaways. However, many people are opting to stay closer to home with trips within driving-distance (47%) or domestic trips (44%) being favored. With so much uncertainty ahead, consumers are also demanding flexible cancellation and refund policies (76%) and are more open to considering hotels offering discounted rates (65%).

Consumers' willingness to travel also comes with caveats for hotels in terms of advancements in cleaning and technology. In response, 70% of hotels already are or are planning to adopt contactless technology for check-in, food ordering, concierge services and more. Ninety percent have or are planning to also increase cleaning and disinfecting frequency and training for staff on these procedures and safer guest interactions (89%).

With international border restriction and flying concerns, hotels will be welcoming new types of travelers, making the stakes high to leave a positive impression that will lead to repeat business and word-of-mouth recommendations. The survey found that border closures are reshaping the guest profile, with more than 30% of executives surveyed saying they expect to see a few more or significantly more domestic travelers and over 60% expect fewer or significantly fewer international travelers. This may work in favor of North American hoteliers, 57% of whom reported that the majority of their guests were domestic travelers before the health crisis, signaling a more limited impact on demand.

Hotels are moving swiftly to abide by consumer demands with more than 80% of executives reporting that they were considering or have already made changes to allow for more flexible cancellation and refund policies. Additionally, safety will be the new gold standard – unsurprisingly, space and cleanliness will remain critical, with 84% of travelers agreeing that "creating social distancing" rules for hotel public spaces will be the most influential factor in their decision about which travel brands to choose for upcoming trips. Hotel executives appear ready to meet these expectations, with 82% either considering or already altering public spaces to enable social distancing.

Technology is enabling social distancing and cleanliness by reducing the need for in-person interactions and empowering hotels to deliver service without contact. Specifically, more than 70% of executives said they were considering or are already using contactless payment and digital messaging services and close to 60% were considering/already using room keys activated by smartphone. Consumers concur, indicating that contactless payments (35%), digital room keys (26%) and digital messaging services (20%) were among the top three changes that would make them feel more comfortable staying in a hotel.

Over 70% of executives agreed or strongly agreed that self-service technology will be important to assisting guests while minimizing unnecessary contact, with two thirds (67%) reporting they were considering or are already using self-service check-in procedures. A similar portion of consumers (70%) agreed or strongly agreed they'd be more willing to stay at hospitality businesses that implemented these types of services, with 23% citing self-service check-in via kiosk as a change that would increase their comfort.

More than 60% of executive respondents reported they were considering or already making changes to expand room service options and 50% are looking into expanding meal takeout/delivery options. One-fifth of guests ranked expanded room service options as a top factor for alleviating concerns, allowing them to avoid shared spaces such as hotel restaurants.

The study was conducted by Oracle and Skift and surveyed more than 1,800 hospitality executives and 4,600 consumers across North America, Europe, Asia-Pacific and Latin America.out less in the next 12 months, most (54 percent) cite the need to save money as the primary reason for plans to cut back; however, the desire to eat healthier is a close second at 50 percent (also an increase of eight percentage points over the survey of March 2010).

Marketing channels and tactics are also a concern for restaurant companies moving forward. Despite movement over the past couple of years toward online marketing, only 20 percent of diners surveyed indicated that digital media influenced their dining-out decisions. For more information visit www.alixpartners.com.

Evoke customer stories during video focus groups with four simple questions

| By Tom Neveril

snapshot

Tom Neveril offers tips for adding the richness that stories bring to your video-based qualitative research.

www.quirks.com/articles/2020/20200913.aspx

In the wake of the pandemic, marketers should invite their customers to video focus groups and ask them to share their stories. The popularity of Zoom, Skype, etc., has made this easier than ever. And people are eager to talk – and listen to others – about how life has changed.

Customer stories are valuable to marketers not only for their inspirational power but also because they reveal behavior and decision-making. When we understand what drives current behaviors, we can better predict what will drive future behaviors in the context of shopping and/or buying.

For example, years ago, a frequent business traveler shared this brief story with me:

"So, for many weeks I would always go to this hotel on Monday and leave on Wednesday. I got so tired of standing in line to check in. Then one day when I arrived, I left the car with the valet and when I walked inside, one of the staff greeted me, handed me a room key and said, 'Your room is ready for you.'"

This story was one of several that helped guide the client's development of an award-winning marketing campaign.

In this article, I'll lay out a simple method for gathering stories like this in video focus groups. But first, let's start with a useful definition of a story.

Stories have four elements. I believe all stories are built using plot, conflict, surprise and lesson. These elements are present in every story, from the grandest novels to the ancient myths to the story above.

Plot is a sequence of causally-related events. In the above example, the business traveler was made to wait in line repeatedly. This caused him to complain (I confirmed this later in the research session), which caused the hotel to give him personalized service.

We are all constantly "plotting" along as we have consumer experiences. Plots are important because they reveal needs, which are often different from what people say about their needs.

Secondly, stories have conflict. Conflict is created when satisfying one person's needs appears to prevent the satisfaction of another person's needs. (This also applies to groups of people.) In the example, the traveler needs to avoid waiting in line to be checked in. His need comes into conflict with the hotel staff's need to use a standardized guest check-in procedure.

Conflict is important because it reveals the depth of our needs. For example, if streamlined check-in was a "must have" for the traveler, he may have switched to another hotel. And from the hotel staff's perspective, if satisfying the traveler wasn't a top priority, they may have continued to make him wait like the previous check-ins.

Stories must also contain the element of surprise. Surprise occurs when reality defies an expectation about life. When listening to a story, keep in mind that it's not necessary that we in the audience are surprised. Rather, it must be plausible that either of the opposing people has been surprised.

A surprise or a plot twist is important because doing the unexpected shows creative problem-solving. This is true in all novels, movies, TV and even customer stories. Creativity is what makes all storytelling so engaging and powerful.

In the traveler's story, the hotel didn't speed up the check-in process by adding desks and staff. It took the creative, unconventional route of eliminating the desk check-in process altogether. When marketers demonstrate creative problem-solving, the halo of creativity enhances the brand's appeal and memorability.

The fourth and final element is lesson, also called theme or moral. Lessons are essentially the larger implications from the story. Lessons are important because they show us better ways to live our lives.

A customer story lesson needs to be important to the storyteller but it doesn't need to be philosophical or complex. For example, the simple lesson of the traveler's story might be that personalized service makes business travel less stressful.

So how do you evoke insightful – and engaging – stories from participants in a video focus group? Ask these four questions.

Please tell me about a time when you were surprised during your experience with ______ (brand or product or category).
Rationale: The fast track to evoking good stories is by asking participants to recall moments of surprise. Surprises are markers for stories because they're the easiest element to recall. We tend to remember those moments when we suddenly realize that we are – or are not – going to have our needs satisfied.

What burns them into our memory is the intensity of our emotion. The more important the need and the greater the conflict, the more intensely we feel the joy or disappointment of a surprise.

If the surprises you gather are about minutiae rather than epic struggles, that's not a waste of time. For example, if our traveler was really surprised to see that one of the guest room amenities was a hair dryer, that's unlikely to be a marker for a useful story. However, when people start sharing their surprising experiences, they often trigger recollections from other participants, which may be useful stories.

Please explain what happened including the actions you took throughout your experience.
Rationale: Again, it's rare that a participant will recollect a fully-formed story after just being asked for surprises without further probing. If they do recall a surprise, explore the surrounding perceptions and actions. How and why did they come across the surprising event? You may uncover an emotional, important plot for a story.

If your participants are not able to think of any surprises, use this question to uncover plots during a specific part of their customer journey. Explore any emotional experiences or interactions with the brand. It might jar loose a surprise they'd forgotten about and perhaps a complete story.

Please explain a bit more about who was opposing you and what actions they took.
Rationale: Sometimes a focus group participant will only talk about their needs and the actions they took. To confirm the presence of a story, we need to understand the forces that opposed them.

Conflict or opposition always needs to be from others who have their own priorities. So, for example, if a guest can't check into a hotel quickly because of a hurricane, that's not helpful for marketers. But if the reason is that the customer service associate wants to maintain hotel security, that's a strong antagonist.

Sometimes the opposition to a customer is simply the status quo established by the leading marketers within an industry. People often accept "the way it is" in some categories – until a brand uses creativity to innovate and disrupt it. Uber is a great example.

Have you learned any important lesson from your experience?
Rationale: Asking for lessons is often a helpful probe after people have already explained plot and conflict. Sometimes recalling lessons learned will help explain previous expectations and bring the surprise out of the story.

If the preceding questions haven't netted any stories, asking about lessons learned – particularly "hard lessons" – can feel like a fresh angle to participants. Instead of requiring participants to jump to a point in the past, exploring lessons requires them to start from where they are today and figure out how they got there. They can retrace their steps back to those pivotal experiences. And every so often you'll find a participant who can brilliantly articulate a lesson which might also be an insight for your business.

A few tips

Here are a few practical tips. First, remember to respect the technical capabilities of videoconferencing technology. The moderator should ask questions in round-robin style where each participant (maximum of six) speaks for a minute or so. This dynamic works well in videoconferencing, especially when the software features the speaker's image prominently among the other participants (like Zoom).

Second, stack the deck in your favor. If possible, give your respondents an experiential homework assignment before the video focus group. The purpose of this is usually to stir up older memories by having new, analogous experiences. For example, if your brand involves food preparation, ask your participants to make a dish or watch a cooking show. If you're in the car business, ask them to take a test drive. The sights, sounds, products, scents and/or flavors of this new experience might trigger recall of past experiences. Of course the experiential homework assignment could also provide new stories. However, if it includes buying a product or service, consider reimbursing participants for a limited amount of the expense or time involved. This will build anticipation prior to the focus group. And it will help the participants hit the ground running as they start their storytelling session.

special advertising section

23 TOP B2B Research Companies

Business needs have changed remarkably since the start of 2020 and they will likely continue to evolve even after the pandemic has subsided. In order to stay on top of changing demands, it's more critical than ever for businesses to have an accurate understanding of their business needs.

The following companies can help. With high-quality insights and offerings ranging from full-service to DIY, working in industries from health care to IT to CPG, these companies are equipped to help accelerate your research.

www.quirks.com/articles/2020/20200944.aspx

Adience

Founded 2020
Chris Wells, Managing Director

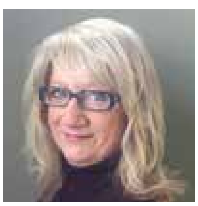
Adience is the "urge to investigate a topic or solution." When we established Adience, our "urge" was to investigate what marketing and insights professionals want from their research partners. So, unlike many agencies, we did some research of our own. We listened to what clients were telling us and built an agency that does things a little differently. Specifically, we offer a lot more flexibility and transparency. For example, we let clients get more involved throughout the research process – they can sit in our analysis sessions if they want. Another example – if clients want to do certain stages of the research process in-house,

we design a project around their needs, rather than insisting on delivering a project end-to-end.

Phone 1-646-799-5020
www.hello-adience.com

Ann Michaels & Associates Ltd.

Founded 1998 | 11 employees
Kathy Doering, CEO



We are a customer experience measurement company working to bring customer service standard insights to B2B companies for over 15 years. We specialize in B2B mystery shopping by using actual business owners. Acting as a normal customer, placing inquiries across all client channels, evaluating timings as well as gathering pricing information and follow-up. Another unique service offering is social media monitoring/research. This program allows us to draw insights around marketing effectiveness, identify audience reach, capture online reviews and identify the best time of day to post in social media. Both programs are effective in competitive intelligence gathering.

Phone 1-800-203-8065
www.annmichaelsltd.com

B2B International

Founded 1998 | 140 employees
Julia Doheny, President – North America

B2B International is the largest B2B-focused market research firm. Our client portfolio includes 850 of the world's largest 1,500 companies and we have conducted 3,500+ B2B research studies spanning a wide range of sectors. We provide the most comprehensive range of full-service B2B research solutions to give your brand a competitive edge, including assessing brand and communications, the customer experience, segmentation, pricing and new product development. Our deep industry experience means we know the best practices in B2B sampling, analytics and benchmarking, as well as how to translate research findings into compelling insights that empower B2B brands to grow. B2B International is in the Dentsu Aegis Network and sits alongside sister agencies Merkle, DWA and gyro. Together, we are the global B2B powerhouse delivering end-to-end integrated solutions.

Phone 1-914-761-1909
www.b2binternational.com

Curion

Founded 2017 | 108 employees
Sean Bisceglia, CEO

Curion provides world-class insights. From quantitative to qualitative research, we apply proven industry-leading, innovative methods to service over 65% of Global 100 companies. A full-service product and sensory insights firm, we work with clients to determine not what products consumers prefer, but why they are liked and how to make optimizations. Clients mitigate risk of marketplace failure by ensuring only quality products are introduced, providing repeatable delight for consumers. We accomplish this with our expert employees, sensory processes, fully equipped facilities and data insights. In 2019 alone, we tested 105,000 consumers across San Francisco, Chicago, Dallas and New York. The result of a merger between Q

Research Solutions and Tragon Corp., Curion pioneered many sensory methodologies considered industry standards today, including Quantitative Descriptive Analysis (QDA)® and Partnership Solutions™.

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curioninsights.com
curioninsights.com/certified-moderator-program

Decision Analyst

Decision Analyst, Inc.

Founded 1978 | 150 employees
Jerry W. Thomas, CEO

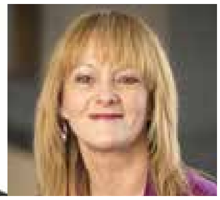
Business-to-business research is complex by its very nature. It begins with target audiences and customers who are hard to find and very specialized. The topics and questions are very technical. In addition, the scope is generally global, therefore flexibility and creativity are critical. From innovation services and customer satisfaction research through many types of strategy research, Decision Analyst has a wide array of services to help clients build and sustain winning business models. Decision Analyst is a leader in advanced analytics and mathematical modeling. The firm melds qualitative research, survey research and marketing science to solve complex marketing problems.

Phone 1-817-640-6166
www.decisionanalyst.com/industry/b2bmarketingresearch

ENGINE

ENGINE Insights

Founded 1938 | 1,200 employees
Don Simons, CEO and Linda Shea, EVP, B2B

B2B at ENGINE Insights helps organizations determine the best strategies for sustainable growth – entering new or adjacent markets, innovating products/services/processes and growing existing customer relationships. The goal is to quantify the merits of growth opportunities by addressing these critical questions: how do you size the space and effectively assess the risk; what are the ways to foresee change/disruption and seize opportunities; and how do you anticipate your customers' next step in their journey? We bring together industry expertise, blended research methods and proven business frameworks to increase success rates and decrease risk. Please use the following link to view a video to find out more about our B2B capabilities: vimeo.com/405828685.

Phone 1-212-633-4567
engine-insights.com/product/b2b

FocusVision

FocusVision

Founded 1994 | 400 employees
Zlatko Vucetic, CEO

Established in 1990, FocusVision offers the market's most comprehensive suite of experience insights software solutions, including advanced survey, online interview and focus groups and online qualitative research community solutions to get brands close enough to their customers to have a full understanding of customer truth – how they think, feel and act. Trusted by 18 of the top 20 Fortune 100 companies and all of the top 10 health care and CPG companies, FocusVision was honored for its outstanding innovation in customer experience management with a MarTech Breakthrough Award in 2018. Learn more at focusvision.com.

Phone 1-844-712-6777
www.focusvision.com

FUEL CYCLE

Fuel Cycle

Founded 2009 | 75 employees
Eran Gilad, CEO

Fuel Cycle is the leading market research and experience management platform for supercharging the relationship between brands and their customers. Through community, panel, progressive profiling, agile research, UX/UI, automations and a partnership exchange of over 35 end-point solutions, Fuel Cycle offers the only all-in-one insights ecosystem for powering innovation across product, brand, customer and employee experiences. Fuel Cycle serves the world's most customer-centric brands including Google, Hulu, Indeed and more. To take your research to the next level, visit fuelcycle.com.

www.fuelcycle.com

Geo Strategy Partners

Founded 1992 | 52 employees
Mark Towery, CEO

Geo Strategy Partners specializes in business-to-business and industrial market research and strategy. We are best-suited for difficult and complex projects requiring access to hard-to-reach decision makers, an understanding of technical product applications or complex business models and an analysis of the overall market opportunity and competitive landscape. For manufacturers and B2B service firms, we are the go-to firm for go-to-market strategy. We have a full range of qualitative and quantitative market research capabilities. Our data analytics team is second to none and we utilize only experienced consultants and industry analysts to conduct high-value qualitative interviews. A lot of firms can spell B2B well enough to include it on their website; we live and breathe business and industrial markets all day, every day. Offices in the U.S., Europe, Latin America and Asia.

Phone 1-770-650-8495
www.geostrategypartners.com

InnovateMR

Founded 2014 | 110 employees
Lisa Wilding-Brown, Chief Research Officer

InnovateMR helps connect researchers to a global network of verified B2B professionals, enabling organizations to stay attuned to the marketplace. With over 50 security checks spanning the participant lifecycle, the InnovateMR First Class Panel™ ensures high-quality data you can trust. From IT decision makers to contractors, Innovate's unique recruitment strategy and extensive firmographic profiling, which aligns to Microsoft's B2B taxonomy, allows you to reach even the most niche target audiences. B2B market research can be challenging and complex to execute. Partner with the experts at InnovateMR to help make your next project a success.

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www.InnovateMR.com

Ironwood Insights Group, LLC

Founded 2017 | 40 employees; 5 call centers
Brad Larson, Founder and CEO

Ironwood Insights Group leads the market research industry for consumer research by offering seamless integration of all research methodologies into one point of service. We assist corporate researchers, marketers, marketing research firms and consultants with high-quality data collection and analytic services. Our platforms use the latest technology with cloud-based servers and panel integration for increased production, quality and security. We maintain strict security and confidentiality controls. Services include consultation, questionnaire design, sample sourcing, survey fielding, data processing, analytics and reporting. Qualitative methodologies include traditional and online focus groups, bulletin boards and in-depth interviews. Quantitative methodologies include CATI/CAWI, online surveys and face-to-face interviewing, with international reach through vetted partners. We are dedicated to providing our clients with the best research solutions at reasonable rates. Call or e-mail today for "Insights that provide clarity and drive action."

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Just The Facts, Inc.

Founded 1994
Bruce Tincknell, Managing Director

Just The Facts Inc. has 30 years of strategic B2B experience (including online capabilities). Our JTF Consulting Group works closely with B2B clients in developing an optimal strategic methodology to achieve results and provide direction. If your current research supplier doesn't understand the critical nuances of your needs, then their low-price research is strategically costly. Conducting quality B2B research means having a strategic partner to effectively guide and manage your important assignments. Whether it's focus groups, interviews, surveys or market intelligence, JTF has proven expertise in effectively implementing B2B research. We have extensive experience in win-loss, VOC studies, decision-making, new products, competitive and market assessment. Every engagement provides in-depth analysis and insightful reporting. Contact JTF for the highest quality B2B research. Let's discuss your specific needs and ensure your B2B initiatives are ready for market.

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www.justthefacts.com
Testimonials www.justthefacts.com/testimonials-x-30

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, focus groups, brand awareness, advertising and creative testing and mock juries, 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.

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theMSRgroup.com

Murray Hill National

Founded 2013 | 22 employees
Susan Owens, COO

Clients trust Murray Hill National with thousands of studies per year as their research partner. In return, we deliver valuable solutions and high-quality recruitment for their consumer, health care, business-to-business and technology projects. For the last seven years Murray Hill National LLP, rebranded under new ownership, has advanced to one of the leading data collection and recruitment companies in the U.S. Our teams are committed to meeting your research needs. We provide high-quality health care recruitment with access to 465,000 physicians, nurses and more and we organize more than 100 patient panels. Our qualitative services extend far beyond the traditional focus group. Our call center has 45 CATI stations where we conduct all of our telephone interviewing including qualitative, quantitative, phone-to-web or old-fashioned CATI. Call us today for your next project!

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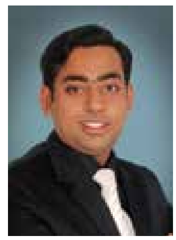
www.murrayhillnational.com

NextON Services

Founded 2013 | 18 employees
Naim ul Qadar, Founder and CEO



NextON Service's existence has been driven by the quest for technology-driven research. Since its inception in 2013, NextON has built practices to cater to the fast-changing communication and technology-driven world. NextON's belief is that clients need a partner who can produce accurate and relevant information and turn it into actionable outcomes. We turn data-driven market research into insights that provide true understanding of people and markets. Our dedicated end-to-end services, which include survey programming, data processing, coding, charting, reporting and more, combine research and analytics focusing on accuracy, security and speed. That's why so many international companies rely on us to help them spark better connections. This approach has helped NextON build strong relationships with the biggest players in the market research industry.

Phone 1-971-50-941-9689 (UAE); 1-818-453-1793 (U.S.)
www.NextONServices.com

OMI (Online Market Intelligence)

Founded 2007 | 100 employees
Dr. Alexander Shashkin, CEO

Online Market Intelligence (OMI) is a leading local provider of online fieldwork in Russia, Ukraine, Belarus and Kazakhstan. We are the first ISO 20252:2019-certified company in the Eastern European region. With OMI online panels you can access over 1 million panelists recruited from a wide variety of local web portals and professional sites. We strictly follow the ESOMAR standards in the area of online research and constantly care for the quality of all our panels. Along with deep consumer profiling, we have specialized panels in Russia; a B2B IT panel to reach IT specialists and entrepreneurs; a physicians panel with access to more than 15,000 M.D.s; and patients panels in Russia and Ukraine with in-depth profiling on various diseases. In addition to classical surveys we conduct online advertising effectiveness studies, Omnibus studies and provide online qualitative research support. Contact us via rfp@omirussia.ru.

Phone +7-495-660-9415
www.omirussia.ru/en

Opinions 4 Good (Op4G)

Founded 2010 | 30 employees
Frank Nappo, CEO and Frank Hayden, COO

Op4G is a premier data collection company with unique recruitment methods and best-in-class programming services. We work in conjunction with nonprofit partners and trade associations to find hard-to-reach audiences for participation in our clients' surveys. Our unique approach to recruiting yields a highly engaged group of people who, as respondents, are dedicated to helping our market research clients fulfill their information needs. Clients' incentive funds have allowed panel members to donate nearly half a million dollars to nonprofits worldwide. Op4G is your trusted partner for everything from difficult recruits to everyday consumers. Op4G is headquartered in Portsmouth, N.H., and operates globally.

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www.op4g.com

OvationMR

Founded 2017
Jim Whaley, CEO

Fast, Reliable Answers for Insightful Research®: Where researchers find high-quality data from global B2B and consumer online survey audiences to significantly improve study success rates. "Our mission is to expand opportunities for researchers to do the work they believe in and can stand behind, for their company, their community and their cause." We conduct tracking studies, segmentations studies, conjoint studies, awareness and usage studies, customer experience, political polling and much more. Our clients are independent research practitioners, consulting organizations, pollsters, global market research companies, nonprofits, NGOs and global brands. We provide sampling and supporting research services in every region of the world. You can contact us today at info@ovationmr.com.

Phone 1-212-653-8750
www.ovationmr.com

Quest Mindshare

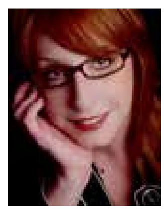
Founded 2003 | 90 employees
Greg Matheson, Managing Partner and Joe Farrell, Managing Partner

Quest Mindshare is one of the largest providers of international B2B and B2C research with online panels that span the globe. Our experienced research team has "seen it all" when it comes to devising sample and data collection strategies to deliver on your hard-to-reach audiences – whether it's IT or financial decision makers, web developers, small business owners, moms or geo-targeted music rating surveys. Quest leads the battle against fraud and cyberattacks with the industry's premier security tool, Quest DETECT™, regarded as the most effective sample security technology on the market. Quest's goal and commitment is to continue to be a trusted source of quality sample and data collection services.

Phone 1-416-860-0404
www.questmindshare.com

ReRez

Founded 2002 | 10 employees
Debbie Peternana, CEO



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www.rerez.com

SurveyMonkey

Founded in 1999 | 1,300+ employees
Zander Lurie, CEO

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E-mail marketresearch@surveymonkey.com
www.surveymonkey.com/market-research

Symmetric, a Decision Analyst Company

Founded 2016 | 150+ employees
Jason Thomas, President

Symmetric operates five B2B worldwide online panels: Physicians Advisory Council®, Medical Advisory Board®, Executive Advisory Board®, Contractor Advisory Board® and Technology Advisory Board®. Symmetric also operates American Consumer Opinion®, a worldwide panel of over 7 million consumers. Symmetric places a high value on representative samples, scientific sampling methods and advanced fraud-detection systems. Our online panels are carefully balanced, continually refreshed and systematically cleaned. Non-responders, speedsters and cheaters are continually purged. Symmetric provides sample for both qualitative (focus groups, depth interviews and ethnographies) and quantitative projects. Additional services include programming, hosting, online communities, tabulation, coding and IHUT mailing.

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www.symmetricsampling.com/panels

Telepoll Market Research

Founded 1990 | 75 employees
Christine Schmakies, Director of Operations

Dial It Up! Telepoll Market Research is a dedicated 60-station telephone data collection firm. With 30 years of experience, our proven and proprietary data collection methods are second to none. We've managed virtually every type of research. Telepoll's satisfied clients include financial services and retail companies, marketing and brand management firms, groups, associations, political parties and governments. From customer satisfaction to challenging C-level studies, Telepoll tailors itself to each and every client and their respective campaigns and delivers even on the most complex and unique projects. Telepoll proactively manages and delivers projects with quality and precise data.

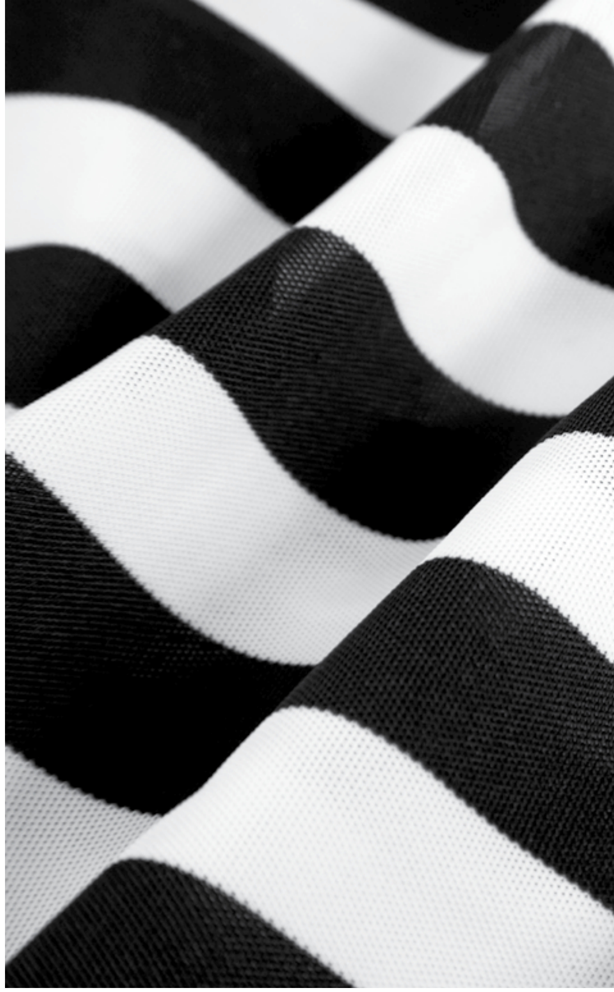
Phone 1-416-977-0608 ext. 222
www.telepoll.net

••• the business of research

Flawless team playing

How to be a good research partner

| By Jenny Callans



snapshot

Ford Motor Company's Jenny Callans outlines ways researchers can work more effectively with their internal and external partners.

www.quirks.com/articles/2020/20200906.aspx

Research is amazing. People are endlessly fascinating and even the most mundane study challenges my thinking about what it is to be human. But getting ready to do research well can be daunting. I like to think of research as a true partnership; there are steps I can take to be prepared, there are times I rely almost entirely on my partner and there are all moments in between when we work together.

Here, I discuss some practices that, when implemented, set up effective research partnerships. If you've already got a good research partner – whether internal or external – you may already be taking these steps. But if you're in a partnership-building phase or you're having trouble, these practices should help. My perspective is that of an in-house researcher – my "clients" are all my coworkers at Ford Motor Company – but I regularly work with external partners, too, and a lot of these practices still apply.

Let's start with what you bring:

Clients should come ready with the who, what, when, where and, most importantly, the why. If some of these are still open questions, at least have started your thinking on them.

Researchers typically bring in the how but they often can't bring that in until after some discussion. They can certainly help nail down the finer points of who, when and where but that also comes after some conversation.

Before you even reach out to your research partner, start with the why of your research needs. Why do you need this research? What does successful research look like, in this instance?

This might be straightforward: "Successful research will tell us which digital interface is more intuitive for new users."

It may be complex: "We need to understand how we can get rental customers to take care of our vehicles."

It can be straightforward to ask but complex to answer: "We need data on touchscreen usage, post-pandemic, in order to plan our next round of

product offerings."

This part comes from you, the client. You *must* know your why. Any why that comes from a research partner – whether that partner is internal or external – may be interesting from a research perspective but of little use to you. Sure, you can have conversations with your research partner about what your product is or who your target market is but you must be able to elucidate why you need to learn something.

Once you have your why, restate it as a question – your central question (CQ) – and assess whether there is, in fact, an answer.

STRAIGHTFORWARD
"Successful research will tell us which digital interface is more intuitive for new users."

BECOMES THE CQ: *"Which digital interface is more intuitive for new users?"* This can be answered by comparing types of interfaces.

COMPLEX
"We need to understand how we can get rental customers to take care of our vehicles."
This kind of discovery research is broader in scope but success can still be defined. Try stating it as a "how might we" CQ: *"How might we support a sense of temporary ownership in rental customers?"* We can break this broader question into component parts and answer those parts: How do our current customers behave toward our vehicles and why? What are some other situations when people don't own something but they still take care of it and why does that happen? If someone knows they're only going to own something for a short period of time, do they care for that thing differently?

STRAIGHTFORWARD + COMPLEX
It can be straightforward to ask but complex to answer: *"We need data on touchscreen usage, post-pandemic, in order to plan our next round of product offerings."*

BECOMES THE CQ: *"How will people respond to public touchscreens, post-pandemic?"* This is impossible to answer effectively because we've never before experienced a global pandemic and therefore there is no analogous situation. What we think we know is changing frequently, even from week to week, and behaviors can also change quickly. Yet people can become complacent and fall back into old habits. Add in regional variations in behavior and this question is too broad. Narrowing it down might make the question answerable but that same narrowing might make the answers useless, from a business standpoint.

This step may be a collaboration between you and your research partner. Even when the question is straightforward, your research partner can help you refine it. Most importantly, though, your research partner can help you land on questions that are answerable – or they can tell you that the answers won't really help and why that's the case.

Now that you've defined your central question, you've on your way to defining the how.

CQ: *"Which digital interface is more intuitive for new users?"*
>> A/B testing with semi-structured interviews to gather qualitative data.

CQ: *"How might we support a sense of temporary ownership in rental customers?"*
>> Interview existing customers to understand their feelings about their rentals. Investigate analogous situations in which people are exhibiting the kind of feelings and behaviors we hope to inspire, such as short-term vacation rentals, borrowing a friend's car for the weekend and even fostering a dog or cat that's awaiting a forever home. Study short-term ownership situations, such as people who upgrade their cellphone annually or people who are active in swap meets.

CQ: *"How will people respond to public touchscreens, post-pandemic?"*
>> As established, this question can't be effectively answered. But if it's worth the resources for long-range planning and if the parameters can be tightened (such as by nar-

rowing the market demographics or geography and by narrowing the focus to something like "airplane touchscreens"), a longitudinal study can easily be launched to provide ongoing, up-to-the-minute data on consumer attitudes.

Advising you on how best to learn something is your research partner's strength. Let your partner bring all their expertise to bear on this – be open to all their ideas and then work through them to figure out what will get you the best data, given your timeline and budget. It could be that the data you really need will take longer – and cost more – to get but there also may be intermediate steps to getting that data and perhaps just getting to one or two of those will actually be enough. Let your research partner coach you on what makes the most sense.

A word of caution here, though: This is where scope creep can become a problem. Stay as focused as possible on your CQ and work with your research partner to identify what types of data are critical and which are just nice-to-have.

Now it's tactics

Now you are well-positioned to identify the who, when, where. Your strategy is set, now it's tactics. What markets make the most sense? Do you need to go into the field or can this work be done well virtually? Who do you need to talk to and for how long? How much should incentives be worth?

CQ: *"Which digital interface is more intuitive for new users?"*
>> A/B testing with semi-structured interviews to gather qualitative data: can easily be conducted online or in-person; would be good to talk to at least 12 people (N=12), alternating which interface is presented first; consider demographic targets – screen for people who would typify new users. This could easily be completed in a week or two.

CQ: *"How might we support a sense of temporary ownership in rental customers?"*
>> Interviews with current customers: perhaps N=5, one hour each, online or in-person.
>> Analogous research via contextual inquiry: N=5, one hour each, in-person in a situationally appropriate context if at all possible (for example, meet up while they're borrowing their friend's car).
>> Observational studies: Consider spending a morning at a local swap meet and engage people in conversation about your topic of inquiry. These three approaches might take your research partner a month.

CQ: *"How will people respond to public touchscreens, post-pandemic?"*
>> Longitudinal panel: Recruit a group of people who represent your desired market(s) and convene them regularly – online – over a period of months. Involve them in a variety of discussions about this research topic and others to ensure that they stay engaged. This is an ongoing effort that will be most useful over the course of months, not weeks.

This is squarely within your research partner's wheelhouse; take their recommendations seriously. Of course, ask questions so that you understand what's behind the recommendations but recognize that sample sizes and timelines might not have any wiggle room. Even additional resources – such as a larger research team – can't make certain things happen faster. A thoughtful approach to data collection, synthesis, analysis and reporting takes a certain amount of time.

Scope creep can be a problem at this stage, as well. It becomes obvious that other research objectives are aligned so with a widening of the participant pool or with a bit more time you can get a two-for-one. After all, the digital interface interviews could include a section on preferences or the interviews with rental customers could also cover how they decide what to rent.

Each incremental addition, though individually discrete, adds time to the planning process and to the reporting process. The two (or more) lines of inquiry might be best served by different respondent audiences. These additions might even distract from the main CQ, diluting that data to the point of uselessness. Open communication with your research partner, and clarity of purpose on your part, are needed here.

None of this means anything if you don't take time to review and socialize the research findings. A research report can be many things – a slide deck; video compilation; a paper with data tables and illustrations; even prototypes built from interview data – but it's useless if it's just filed away. Spend time with your research partner reviewing their findings, asking questions, understanding the nuances. Get your research partner's take on how best to communicate findings with your stakeholders. Then share out what you've learned.

Allow you to iterate

The real beauty of long-term partnerships is that they allow you to iterate on previous research, as needed. This kind of relationship builds from strength to strength and also lets you make the most of failures. A research partner who knows your history of central questions, for example, and a partner with whom you confer regularly about your upcoming deliverables, who knows what's worked well for you in the past and what's been a tough sell to stakeholders – that's a research partner who makes your work better. It's worth the time to cultivate this kind of partnership, whether internal or external. Know what you need, what your strengths and limitations are, and then lean on your research partner to build from there.

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health care research

Clearly better

Study underlines the importance of clarity in doctor-patient communication

| By Tom Donnelly, Tatiana Barakshina, Jim Kirk, Bill Stone and Heather Ashley-Collins

snapshot

In a follow-up to a 2017 Quirk's article, the authors report on how a health care provider's assessment of their patient's ability to understand health information influences their communication style.

www.quirks.com/articles/2020/20200907.aspx

Health literacy (HL) is normally thought of as a patient skill that allows them to understand important written information about their health care. In fact, HL spans both written and spoken words and effective health care communication requires that it be used not only by health care users (i.e., patients) but by health care professionals as well.

In this article, we: provide context for a current research study on physician-patient communication; describe the method of our qualitative research with both cohorts; discuss the key findings we learned about physician communication styles; and present implications for researchers, providers and marketing communication (marcom) professionals.

Background

The Intellus Health Literacy Initiative (HLI) is a coalition of volunteers dedicated to harnessing the power of health literacy in market research to improve patient outcomes. The HLI was established in 2014. Since that time, we have created original content, conducted novel research and spoken at national conferences to increase awareness of the vital role that health literacy can, does and should play in the health care market research industry. The research study discussed in this article is an extension of a survey we administered to patients, physicians and pharmacists. The results of the study, reported in an article in the October 2017 issue of Quirk's,[1] validated that optimizing written materials (such as booklets, patient package inserts, flyers, newsletters, etc.) with HL best practices improves comprehension for individuals at all levels of HL.

While optimizing written materials is important, physicians' counseling styles play a pivotal role in patient outcomes. The objective of the current research project is to better understand how the communication styles of health care providers (HCPs) vary based on how they categorize patients' ability to process important health care information. Our research showed the interconnectedness of written materials and the physicians' fundamental approach to counseling.

We used this question to swiftly assess health literacy levels of potential study subjects, aiming for sufficient representation of both limited and adequate health literacy respondents in the research. Participants' health literacy levels were ultimately validated using the newest vital sign (NVS), administered when they arrived for the interviews. They were segmented into one of two groups: those who were likely to have lower health literacy and those who were likely to have adequate health literacy.

The interviews were videotaped and they included a guided discussion about the participants' hypertension diagnoses and their reaction to a printed patient handout on hypertension. The handout was intentionally designed to be non-health-literacy optimized (e.g., it included complex words instead of plain language terms such as "exacerbates" instead of "worsens," "renal failure" instead of "kidney problems" and "sodium intake" instead of "salt levels"). This encouraged questions from the patients and it provided opportunities for physician counseling and commentary on the handout. Team members who could not be in-person watched via FocusVision.

Patient vignettes. Videotaped interviews with four of the 10 patients were selected to create five-minute vignettes. Two vignette pairs featuring one patient with higher health literacy and one with lower health literacy were created. The pairs represented patients of the same gender and race (two white males and two black females) to eliminate gender and race as variables contributing to any observed differences in physician communication. These video clips were used as stimuli in the physician research.

HCP web-TDIs. Twenty HCPs who treat hypertension (15 PCPs and five cardiologists) were recruited by Schlesinger Group to participate in one-on-one, 60-minute, web-enhanced tele-depth interviews (web-TDIs). Civicom provided its web-platform, technical support and facilitation, helping to get HCPs logged on. After discussing

Methodology

As shown in Figure 1, in Phase 1 of this project, hypertension patients with limited (LHL) and adequate health literacy (AHL) discussed their respective health journeys and reacted to a patient decision guide. In Phase 2, patient vignette video clips that were created from the Phase 1 patient research were shown to HCPs to provide context for the HCPs to role-play their counseling interaction with patients. We asked the physicians to summarize how they use currently available written materials to support their counseling and how they would or would not use materials built on the principles of HL.

Patient IDIs. Ten diagnosed hypertensive patients who started on a prescription for high blood pressure within the past 12 months were recruited by Schlesinger Group for 60-minute in-person in-depth interviews (IDIs). Their health literacy levels were initially assessed during the screening process using what is commonly referred to as the forms question: "How confident are you filling out medical forms by yourself?" Research reveals that this metric has a .74 to .84 AUROC (area under the receiver operating characteristic) ($p<0.05$) with health literacy levels.[2]

Figure 1

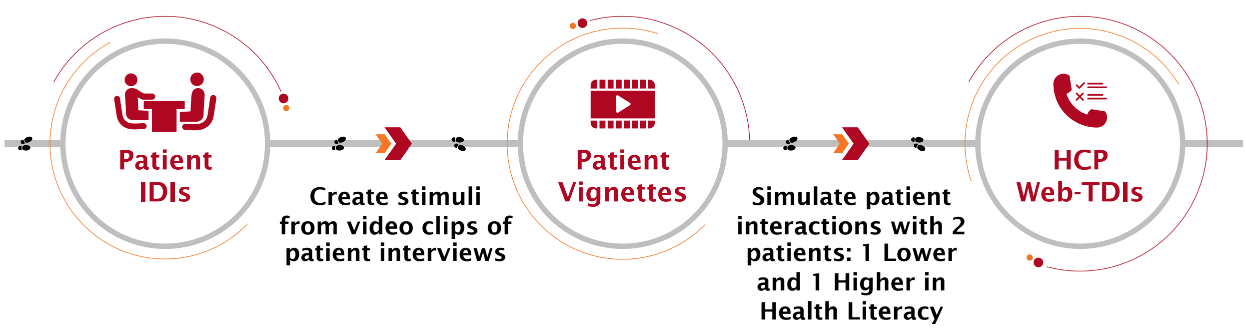
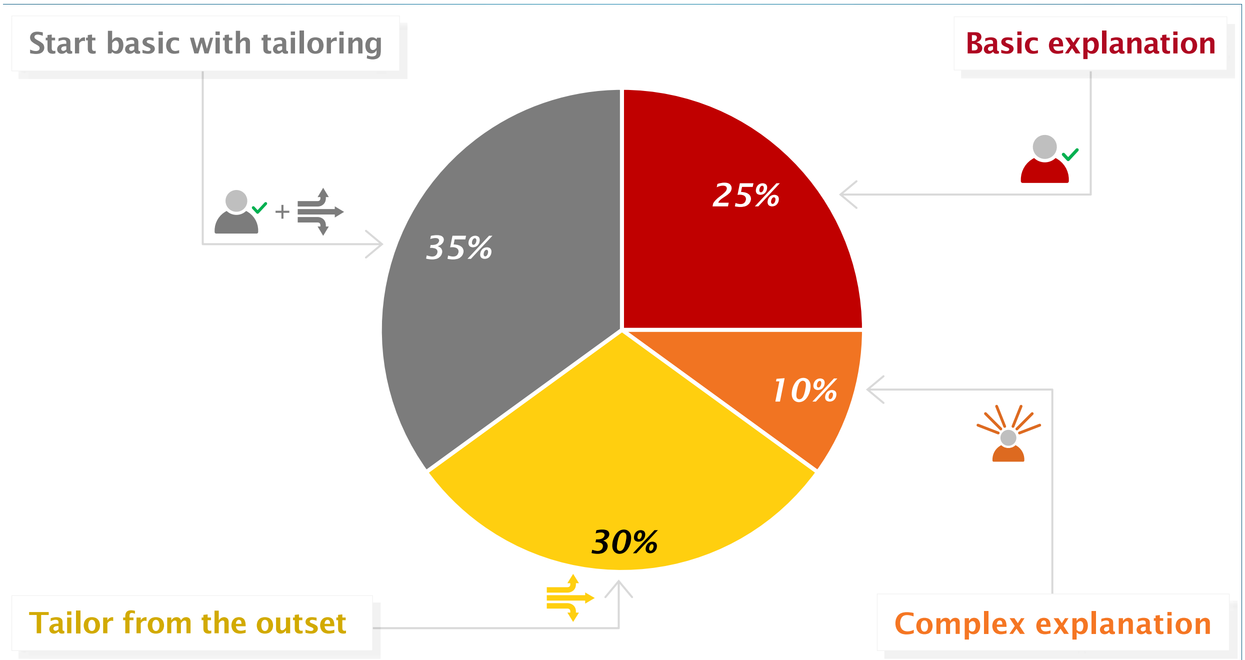


Figure 2



HCPs' typical approach to hypertension patient interaction, HCPs were then engaged in a role-playing exercise in which they counseled two patients – one with higher health literacy and one with lower health literacy – using the patient vignettes. Order of higher vs. lower HL vignettes was shuffled across interviews, with vignette pairs (white males and black females) also varied across HCP interviews.

Results

We analyzed our findings, using Excel-style transcripts by SyncScripts, to address three major questions:

1. How do HCPs group their patients and is health literacy considered?
2. How does HCP communication vary by the HCP's perception of the patient's health literacy?
3. How do/would HCPs use patient education materials?

How do HCPs group their patients and is health literacy considered?
HCPs use different cues to group their patients: ability to articulate their questions and concerns; motivation or likelihood of compliance; capacity to correctly "teach back" what the physician just communicated to them; level of education and profession; having a medical background; and clothing.

While most physicians buy into the concept of HL, the term was not universally used. Some physicians volunteered terms such as "comprehension" or "understanding" in discussing HL but then went on to say that these terms are more the result of HL rather than a synonym for it. Despite the general agreement that HL is important to consider, as many as one-third of HCP respondents misidentified patients' level of HL.

How does HCP communication vary by the HCP's perception of the patient's health literacy?
Many HCPs tailor counseling based on their perception of their patients' understanding. This tailoring includes the content of the HCPs' verbal interaction, how quickly they move from one topic to another and the structure and complexity of their spoken sentences. Four strategies for counseling emerged (Figure 2):

- Everyone receives a basic explanation (25%) – physicians rely on patients' unsolicited questions and self-guided web searching to supplement their understanding.
- Everyone receives a more complex explanation (10%) – these physicians feel that they should put forth a full explanation to every patient.
- Physicians tailor the content and language from the outset (30%) – these HCPs rely on their assessment of the patient's literacy and comprehension level from the beginning of interacting with the patient (some say they rely on their nurses to give them a heads-up on how ready the patient is to hear their message).
- Start with a basic explanation with tailoring after initial reactions (35%) – this was the most popular approach and was claimed by the physicians as the most responsive and responsible.

Some physicians try not to assume a particular level of HL. Their initial counseling of patients generally assumes a basic level of understanding, which they check throughout their interactions. While most physicians noted the patients' reaction to our handout, they did not base their counseling strategy on that reaction.

How do/would HCPs use patient education materials?
There was a surprising lack of consistency and an absence of specific organization of patient education materials. Typically, physicians use materials that are more conveniently accessed, with little attention dedicated to the format and language of the materials. A few use canned materials (e.g., AAFP, AHA), particularly if they are available as standard printouts from their electronic health records system. Two physicians mentioned that the EPIC system has a particularly useful handout. Some HCPs use a handout on the DASH diet as a useful starting point

for discussion about diet and lifestyle. A few physicians say they create their own handouts to summarize the condition and its management. Regardless of their approach to written materials, most rely on verbal explanations as the most flexible and useful way to interact with patients because they can readily tailor explanations to individual patients. The handouts used are often for patients to take home rather than used during the discussion.

Most HCPs and patients picked up on several elements (noted earlier) in our handout that were purposefully not optimized. This shows that physicians and patients can identify the difference between a more complex and a health literacy-optimized handout. Despite this ability, HCPs do not focus on providing patient education material that can be easily understood by all.

When asked how interested they would be in a modified handout or multiple handouts, most HCP respondents said they prefer one version that is basic and understandable by all. Although a few suggested having an additional, more detailed version for higher-comprehension patients, most physicians were concerned about the time needed to manage multiple versions. Regardless of what is provided, most would continue to rely on verbal interaction with patients, either in place of written materials or as the core of a package of counseling.

Discussion

The objective of our HL initiative is not simply to improve written materials but rather to enhance the overall quality of health care communication, to empower patients in managing their health and to encourage health literacy best practices among physicians. One of the overwhelming impressions from the HCP interviews is that the physicians are generally interested in maximizing the effectiveness of their counseling. All HCPs are limited by the time demands of modern health care practices and some see written materials as a valuable resource for supporting counseling.

Our research shows that doctors should start conversations in plain language with all patients because:

- Physicians are inaccurate judges of patient health literacy.
- Patients at all health literacy levels will understand their disease and treatment better.
- Patients with higher health literacy will have a chance to ask more questions and connect with their doctors.

This recommendation holds up whether written materials are involved or not. This approach can be used in four basic counseling strategies depending on whether written materials are used and whether physicians provide more detailed information to select patients (Figure 3).

This research showed that counseling is itself dependent on patients' ability to comprehend and act on critical health information. Physician training should provide greater focus on health literacy and comprehension. The approach of starting basic, regardless of the availability of health literacy optimized materials (paper or web-based), will ensure that the largest proportion of patients will be effectively served.

Implications

Patients come from a variety of backgrounds and their level of HL inevitably varies. In a time-constrained environment of direct interaction, it is impossible for providers to accurately judge the HL level of all patients. Our findings led to important implications for insights professionals (including industry market researchers and clinical researchers), health care providers across specialties and marketing communication specialists – anyone contributing to the development of patient decision aids and written information embedded into EHR systems.

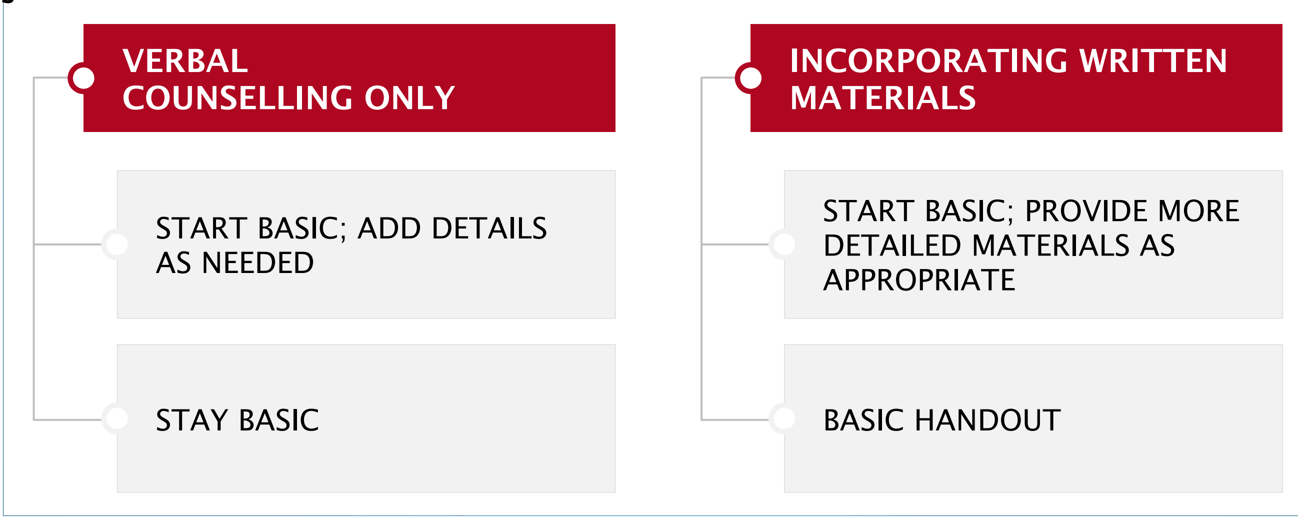
Researchers

Researchers should take HL into account in four areas: recruitment, participation, stimuli and analysis.

Recruitment. Lower-HL respondents engage in market research at a lower rate compared to those with higher HL. In addition, the industry tends to systematically remove lower-HL respondents from market research because we screen out those who are vulnerable to being lower in HL (e.g., lower SEC, older populations, minorities, on Medicaid, less articulate, less able to engage in interviews). When developing information for patients and excluding those with lower HL, the outcome will ultimately fall short to the detriment of both lower and higher HL patients.[1] Researchers should use special recruitment techniques, such as pre-recruiting with the forms question and confirming HL level with the NVS.

Participation. Providing simple

Figure 3



communication of study goals and processes help with respondent comprehension and engagement in the study. When possible, provide both written and verbal instructions. For written directions, using pictures or infographics can help convey meaning. Including an example of the exercise can also give respondents a better idea of what the researcher needs. The actual approach will depend on the study and researchers must be careful not to bias responses by providing the answers sought.

Stimuli. The research stimuli are typically the focus of feedback, such as patient education materials, written instructions for use or a consumer ad. Sometimes stimuli are used for other exercises (e.g., projective techniques, patient journey). Regardless, researchers should follow HL principles[3] in designing research stimuli, including vocabulary and language use, font size and style, grouping/chunking, content/scope, use of white space, justification and use of graphics.

Analysis. Separate analysis of lower-HL patients is advised to ensure appropriate and useful insights are uncovered. Regardless of whether it is qualitative or quantitative data, important trends may wash out or be treated as outliers when lower-HL data is not examined separately.

Providers

Health care providers need to ensure that each health literacy group receives an explanation that optimizes patient engagement and treatment compliance. Our research shows that using a basic explanation as a starting point in both written and verbal communication will optimize comprehension and engagement across all HL levels of patients. Providers should then be prepared to move up to a more tailored explanation if a patient is interested in one. With this approach, patients at all health literacy levels will have a firm foundation for understanding the disease and treatment. Patients with higher HL will get an opportunity to build on their knowledge and involvement, prompting more tailored, detailed communication from providers. Given that providers' time is limited and that their judgement of patients' HL is not fully accurate, starting with a basic approach is the best strategy.

Marketing communication professionals

Marketing communication professionals should consider our advice to both researchers and providers. Information conveyed to patients should follow HL principles regardless of the format (e.g., patient education materials, decision aids, consumer ads, etc.). Our research shows that patients of varying health literacy levels all benefit from a simple, basic HL approach (e.g., language at a sixth-grade level, good use of white space and graphical elements, etc.). Thus, marcom teams should consider a tailored, more detailed format of written materials to be available as an add-on to, not as a replacement of, the simple basic approach. Do not rely on physicians to correctly identify which of their patients should get a simple versus a more detailed handout because they often incorrectly identify HL levels. Motivating patients to act starts with them understanding.

Broad array of styles

We found that HCPs use a broad array of styles for counseling patients and that a range of market research techniques is needed to uncover these dynamics. While this research was focused on HCPs' communications with patients, other dynamics include patients' interactions with others across their networks (such as other HCPs, other medical staff, family, friends, colleagues) and various sources of information beyond what their doctor provides (whether via the Internet, TV, radio, magazines, newspapers, books, etc.). In this study, we demonstrated that health literacy affects such fundamental issues as patient comprehension and confidence, as well as physicians' sense of job satisfaction and efficient use of precious time. Both the transmission of information and the instilling of motivation depends on how well patients, HCPs and the health care system connect. Researchers, providers and marcom teams should take health literacy into account so that they can better help patients live healthier lives.

Intellus' HLI will continue to educate the community, as well as conduct research, including an experimental study to examine the relationship between literacy demands and patient behavior. (We are proud to announce that we won the Institute for Healthcare Advancement Health Literacy Award in the research category for this study!) If you are interested in joining our group, partnering on future studies or would like our consultation in health literacy, please contact us!

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Special thanks to our research partners:

- Schlesinger Group for providing recruitment, incentives, facility and creation of the patient vignettes
- FocusVision for the videostreaming of the patient research
- Civicom for use of its web platform and technical assistance helping HCPs to sign on
- SyncScripts for providing Excel-style transcripts
- Sommer Consulting, Bazis Group, Schlesinger Group and Branding Science for the professional time spent in performing the research

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Don't forget about me

Relationship marketing in the new normal

| By Terry Vavra and Douglas Pruden

snapshot

Thoughts on how businesses and marketers can maintain ties with customers while dealing with the effects of COVID-19.

One of the key tenets of strategic marketing is the understanding that organizations survive and stay profitable primarily by anticipating and adapting to change. (Alderson, 1957) Sometimes change can be as minor as a competitor's aggressive actions. Other times change can manifest itself in far more dramatic scenarios. Marketing textbooks are full of descriptions of the failed destinies of organizations that didn't anticipate or creatively respond to disruptive conditions – breakthrough technologies, geopolitical events or societal trends, to name just a few.

This academic perspective of strategic marketing is particularly relevant given our current world situation. COVID-19 is cleaving its way through the national economies of the world. The resulting business landscape will be totally new territory. Consequences of the virus's intrusion on the U.S.'s free enterprise economy will range from mandated but relatively easy modifications to office and factory staffing and to customer contact and delivery methods to effects that will challenge to the very existence of other categories. Arguably COVID-19's broader impact will alter how commerce, in general, is conducted in the future. One component of the strategic marketer's toolkit which will no doubt fall an early and substantial victim to the virus is establishing and maintaining relationships with customers – the essence of relationship marketing. Traditional relationship-building activities will either be curtailed by customers' unwillingness to participate or by federal, state and municipal actions, enacted to help control the virus's spread, that may restrict the activities.

Connecting on a personal level

Relationship marketing relies on building and maintaining personal interactions with prized customers. It's recognition of the importance of connecting on a personal level with one's supporters, customers or constituency. Emphasizing the personal aspects of a business transaction strengthens the relationship with a vendor or supplier through "emotional glue." But

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how can the business community maintain close ties while respecting interaction protocols suggested by our Centers for Disease Control?

Danny Wegman, CEO of Wegmans Markets, an Eastern U.S. regional supermarket chain of 101 stores, lamented the current situation his stores face: "A huge part of our business has been treating our customers really as guests and entertaining them. We can't do that anymore. We lost our mojo. We have to replace it!" (Wall Street Journal, 2020)

The practice of effective marketing in the current day has only recently accepted the value of allocating effort not just to acquiring customers but also to maintaining current, valued customers (see sidebar). Now the pandemic threatens to derail or substantially alter this philosophy.

The tools of relationship marketing have been conceived to produce several emotional outcomes among customers, all with the intent of strengthening the customer's affiliation with a brand, company or organization. These outcomes are:

- **Recognition/reward** – the feeling that a brand or company appreciates the customer's business.
- **Intimacy/trust** – comfort in sharing personal information with a company and the trust that the company carefully guards what it has learned about the customer.
- **Relevancy/value** – understanding the value of a long-term relationship with a company by the timeliness and relevance of outreaches by the company.
- **Sincerity/genuineness** – although the relationship is business-driven, the customer should sense a genuine commitment from the company.
- **Empathy** – in a true relationship the participants understand a great deal about one another. The customer should feel the company is in tune with her/him.

The net-net of these end results is to create/strengthen a customer's reliance on a supplier, thus increasing loyalty. They're not something that advertising or verbal promises can accomplish; they only occur through real, experienced, genuine interactions over time.

Alter current activities

Considering the many restrictions instituted to control the pandemic, we think it is imperative to consider how COVID-19 will force marketers to alter many – if not most – of their current relationship-marketing activities. As Bain & Co. has observed, "This crisis may be transforming [industries] for good but it could also be a transformation for the good!"

Creative, out-of-the-box thinking will be required to help us transform for the good. In this review we surely won't succeed in identifying all the challenges. But perhaps this discussion will stimulate your thinking about how to maintain customer relationship-building activities in the future for your business and your category.

Customer bases. Without the retail channel providing pre-sale information and post-sale support, manufacturers and service providers will be forced to rely more on their own communications as an alternative. What they'll need to do is up their game with smarter, more highly

Elements of relationship marketing

The opportunity for building customer relationships in the COVID-19 environment will vary from brand to brand depending upon the nature of the business, the tenure and strength of relationships and the frequency and type of interactions. There are no cookie-cutter answers. However, in our book, Aftermarketing, we proposed seven tactics which we believed to be the most important activities for building and maintaining customer relationships. We've updated the list and present the current elements here as a starting point for the planning of relationship building strategies and tactics in the new normal.

Employing the power of customer intelligence. Customer intelligence incorporates the entire act of creating, using and maintaining a customer database. Essential is the ability of the database to dynamically trace customers' purchases (and non-purchase interactions as well) and integrate that information in a learning phase. A strong database would include basic demographics, psychographics and extensive purchase histories. The database is the foundation for customer-scoring. While always our concern, the new spate of customer privacy laws mandate that businesses acquire customers' permission to collect information and establish ground rules for the use, maintenance and destruction of the information.

Mapping and understanding our customers' journeys. This practice is a way of visualizing and quantifying the customer experience. It helps us to identify and rank all salient touchpoints customers encounter in transacting (or attempting to transact) with a business. Viewing the business as a customer experiences it enables management to better respond to customers' needs and perceptions.

Analyzing and responding to customer-initiated feedback. This is the passive side of dialoguing with customers. (We consider it passive because the business has not initiated the dialogue.) This tactic includes analyzing and responding to customers' outreach direct to the firm. In addition, it includes monitoring and analyzing customers' voices as they reach out to the masses through personal interactions and through online social media. If properly executed, it will include both quantifying themes on an aggregate basis and listening to and solving problems on an individual-customer basis.

Monitoring CSAT. We think of this as the brand-initiated, active side of customer dialoguing. Because not all customers will report a problem, disappointment or a success, it is imperative to routinely reach out and sample a firm's customer base to take a pulse check on customers. Once this conversation has been initiated by the company it is important to close the loop, getting back in touch with those with concerns or problems on a one-to-one basis, thanking those who respond and when possible reporting on findings and actions to be taken to all customers.

Maintain effective formal communication programs. Good communication programs, issued across different media platforms, serve as a company's formal mode of communicating with its customers. Customers (who have permissioned contact) look forward to the communications and to being treated as insiders who know more about the company's products and future products than the average consumer. Good communications programs can help develop super users, who can act as advocates and will likely place positive product reviews in the media.

Hosting customer events. Invitations to special events (targeted to the most behaviorally loyal and the highest value current/highest potential customers) are a very demonstrable way to show customers appreciation for their business. Participation in these activities can enhance customers' willingness to personally identify with a brand or company. Hosted events, like factory visits, introductions of new products, etc., feed the egos of customers, creating stronger bonds between them and the sponsoring company.

customized communications. This will require investing in the sophistication and learning abilities of their existing customer bases.

Some organizations are already touting the value of using AI to make databases more relevant and personal. And there are numerous software developers who've created rather large relationship marketing applications. We're not fans of one-size-fits-all panaceas. We believe that many corporate IT staffs have the specialized knowledge about their corporation's customers and products to allow them to fashion highly customized and productive database applications. Investing in the continuing evolution of their customer base capabilities will undoubtedly become a top priority for all businesses who wish to adapt their relationship marketing tactics to the new normal.

Sharing of personal data. Effective relationship programs are highly dependent on sophisticated, "learning" databases. To establish such databases, businesses need volunteered information from their customers and permission to collect information through observation; this requires customers' unquestioning trust. It's uncertain how the pandemic will impact customers' willingness to confide in and share information with their marketers/vendors of choice. There are two possibilities. Perhaps, recognizing their greater dependence on what companies know about them – to serve them better – customers will be more forthcoming in providing their personal information. On the other hand, shelter-in-place and the isolation it has imposed may have made customers more distrustful of the environment and of authority and therefore less willing to share information. Only time will tell. In the meantime, any continuing dialogues that can be maintained may help to perpetuate the pre-pandemic level of trust.

The EU's GDPR and California's Consumer Privacy Act both attempt to place very real constraints on how information is collected from consumers, how it is used and the responsibilities of ownership of the information. While proper in their intent, these regulations will tend to increase the general overhead costs of creating and maintaining customer files.

Experiential marketing. An entire discipline has been formulated under the name of experiential marketing. Customer blueprinting or journey maps are some of the earliest tools offered by this perspective. By graphically (and verbally) enumerating the multitude of touchpoints a customer encounters in conducting business with an organization, these constructs direct and guide opportunities for improvement. We've argued for some time, that the contribution of the experience enhances a customer's relationship with a supplier. Nowhere is this more true than in retailing, where the in-store experience makes brands "whole." It allows customers to feel, to hold, to interact with products whose descriptions are readily available in online, television and print media.

As the pandemic hammers already-reeling brick-and-mortar retailing, online efforts will become much more favored and therefore important. And marketers will need to create new experiences to showcase their products and services. While augmented reality (offered by online sites) promises to simulate some of the ambiance of in-showroom shopping, it's still not a satisfactory analog for the physical experience.

Customer reviews. With limited or altered opportunities to experience products in a retail setting, online customer reviews and social media posts will become an even more important influencer of customers' purchase decisions. The increased importance of word of mouth signals the opportunity to leverage everyday advocates (those customers who are so satisfied and enthusiastic about one's products/services that they readily speak to others about their satisfaction). These brand ambassadors can fill, to some extent, the role previously played by in-store retailing. This all suggests manufacturers will need to rethink how they monitor and respond to customer feedback.

Customer dialoguing. Without their retailer networks to bear a substantial amount of problem resolution, manufacturers and service providers will need to improve their customer service channels. This will mean being more accessible to customers, devoting more staff to customer service efforts and becoming far more timely in responding to customers' questions and problems. These needs require allocating a much higher priority to customer service, creating enhanced servicing processes, hiring more capable customer service reps and providing better training for service staffs.

Customer events. State and federal enactments of shelter-in-place can't help but have a profound long-term effect on customers' lives and future behaviors. As a result, consumers will likely become somewhat crowd-averse. And authorities may continue to prohibit or discourage large-scale gatherings for some time to come. (There are some in the consumer population who have already rebelled against these restrictions; these individuals may be zealously supportive of a return to normal activities. However, their perspective is not supported throughout all segments of the population.)

The combined influence of government-imposed restrictions on congested gatherings and consumers' acquired hesitancy to join large gatherings will severely challenge how we stage and execute customer-appreciation events. They suggest putting a hold on any event that encourages a large gathering of customers. Some such events can be reformulated as virtual events but this will call for lots of ingenuity and creativity. And virtual events lack the person-to-person interaction which for so long has been critical in establishing customer relationships. New and creative ways will need to be conceived of to make customers feel both special and recognized.

Affinity merchandise. We've long believed that merchandise with a company's name emblazoned on it is a good way to forge the bond between a customer and company. When properly executed, this tactic can not only make the bond tangible but can also strengthen and further solidify it. The merchandise, in use, provides a signal that can ignite conversations about the sponsoring brand. There are two problems with the current execution of affinity merchandise. One, many such items are very personal, requiring close contact to be seen by others. And, two, currently so much affinity merchandise is sourced from other countries – possibly carrying a stigma. These concerns suggest corporate logoed merchandise will have to be rethought.

Corporate merchandise serves the unique role of showing friends and acquaintances of our customers that they affiliate with us. However, social distancing will mitigate the effectiveness of merchandise that's so small or personal as to be hard to see when we keep a respectful distance between us. This means brand affinity items that can be recognized at a distance will likely become the new preferred choices for logoed merchandise. T-shirts or ball caps will be more acceptable, popular and more effective than desk calculators or lapel pins. As to the sourcing of merchandise, customers may be less welcoming of a calculator from another country with a company logo affixed to it. This suggests that sourcing of corporate-logoed merchandise will suddenly become important. Domestically produced items may be more welcomed than products from offshore.

Merchandise return policies. We've talked about good return policies being a critical part of the customer experience and in many cases being an opportunity for retailers to intensify customers' loyalty. Even as the pandemic subsides, we can't help but question if customers will be comfortable doing business with a retailer they know welcomes merchandise returns. Such policies would cause customers to fear receiving merchandise possibly contaminated by a previous customer who returned the item.

This likely concern suggests that astute manufacturers may have to offer a refurbishing/sanitation program for products that are returned to retailers. Such a service would allow retailers to turn in returned products for reconditioned/sanitized products that are shipped back to the retailer in new, factory-sealed boxes.

Seismic shift

Despite all the talk and all the writing about online sales, in most categories they are fast growing but still a small percentage of total sales. It's hard to imagine anything other than the pandemic tipping the sca les even more. The result? A likely seismic shift of how all business will be conducted in the future. The pre-pandemic retail outlet as we knew it will likely cease to exist. Retail presence may be necessary only as a location from which to pick up and drop off merchandise.

Beyond these admittedly trivial concerns (in the face of a high death toll and previously unexperienced conflicts with our cavalier social behavior) this pandemic will leave deep scars behind. Personal interactions will probably be hit the hardest. But we can't be certain of the impact. Will we become kinder to one another or, without as much personal interaction will we become even faster to insult and devalue one another? Ultimately, our development and practice of future relationship marketing tactics will be forever changed.

One constant, we believe, is that good and valued customers will continue to wish to be recognized. And, in this very unusual time, businesses that customers can trust will be even more valued. We look forward to how marketing ingenuity will confront these challenges and to the new model of business that will evolve from these trying times.

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snapshot

Jason Martuscello explores how behavioral science-based approaches can give brands the confidence to change pricing, positioning.

brand research

In the eye of the beholder

How brands can bend the rules of pricing with premiumization

| By Jason Martuscello

How much would you pay for water? Would you pay more if the water was bottled? What if it had an artistic label on it? While very few people admit they would pay for water, many do. Asking questions about willingness to pay is deeply flawed but still commonplace in pricing decisions. Not only do people pay for water – which is freely available to most households – but they pay two to five times more for premium variants of water. LIFEWTR, Fiji, smartwater, Essentia – these are just some of the brands that took freely available water and captured premium margins through understanding how customers perceive value.

This article will unravel the traditional practices of value creation and provide a new way to approach the pricing function through premiumization. We will help provide a framework to price products that bends the traditional rules of pricing and enables you to capture premiums.

www.quirks.com/articles/2020/20200909.aspx

Problems and issues

Current pricing practices face several problems and issues.

Letting economics inform pricing and consumer behavior. (Solution: *integrate behavioral economics.*) Classical economics assumes purchase decisions are grounded in rational decision-making and it advocates for maxims such as "consumers maximize purchase utility" or "price increases equal volume reductions." Behavioral economics, in contrast, has discovered key limitations when applying rational economics to complex human behavior. For example, Nike not only raised its prices but increased customer demand; Nabisco charged more for less when it introduced the 100-calorie snack packs. Relying on economics to make pricing decisions without understanding behavior only leaves margins on the table.

Overreliance on price elasticity and willingness-to-pay methods. (Solution: *integrate context factors into methods.*) Relying on price elasticity – the measure of the sensitivity of demand to changes in price – can result in a missed opportunity to recognize when consumers will pay more for brands and products. In classical economic models, price elasticity relies purely on direct, stated measures of willingness to pay and fails to account for the social, emotional and contextual drivers of purchase. It will never be able to identify when customers will pay a premium.

Objective vs. perceived value. (Solution: *Remember that value is perceived.*) While we know customers pay for value, we rarely create, design, innovate or quantify how customers perceive value. To fully account for the value customers perceive, we must incorporate the influences that drive value perception. Historically, these have relied on basic quality and tangible benefits but the success of premiumization proves value is beyond the rational, tangible benefits. Rather, it is rooted deep in fundamental psychological needs.

Pricing is not in a vacuum. (Solution: *Remember that pricing is dynamic.*) Consumers rarely have a predefined price they are willing to pay; instead, they often develop and arrive at a sufficiently acceptable price throughout the decision-making process. Pricing strategies should thus not only try to predetermine willingness to pay but should also aggressively focus on identifying any means that can enlarge consumers' price acceptance, broadening the lens of value by utilizing the five paths to premiumization.

Restrictive view

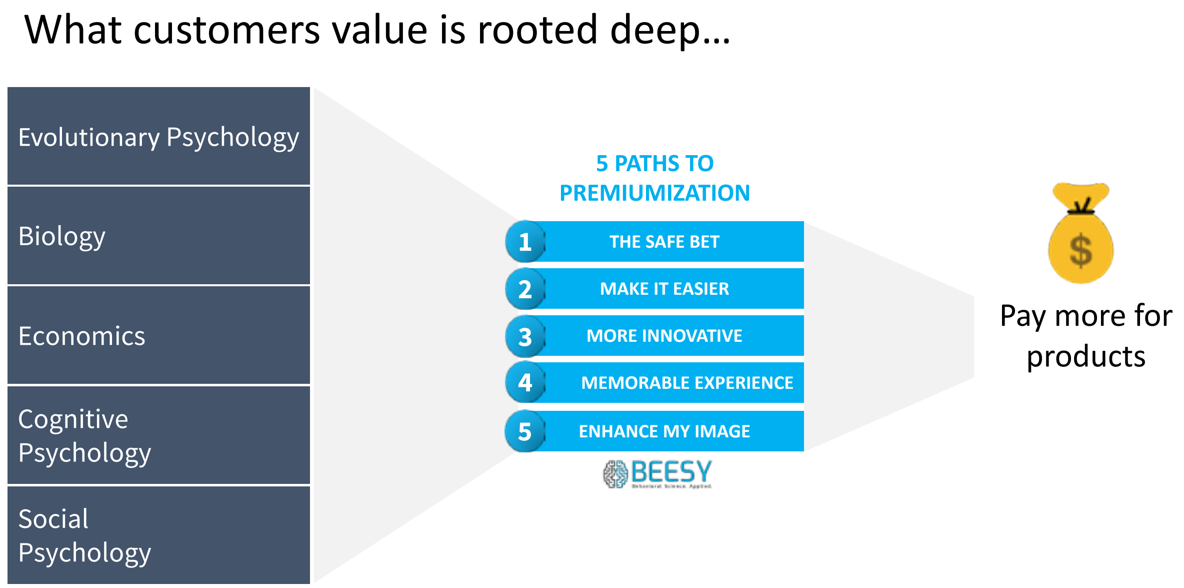
The lens for value creation and price-setting has been limited by the restrictive view of economic benefits added. Getting customers to pay premium has been assumed to be equivalent to innovation – adding product features and benefits – and so companies will charge more for their products by spending more. But what if we can add value to products without driving up costs? This is the focus of premiumization.

Premiumization is the process of getting customers to pay more for brands and products. It strives to increase customers' perception of value without ramping up costs by adding tons of benefits or new features. Premiumization is all about contribution margin – earning more money per unit of product sold – and so the starting point should be prioritizing low-cost, least-effort changes to add perceived value and command margin increases.

There are implicit reasons consumers will pay more for brands (Figure 1).

1. **Evolutionary psychology and the safe bet.** We have an evolutionary need to have reliable experiences and feel safe with our purchases. Consumers will pay more to feel a product is reliable and safe. Whether it's the comfort of the Marriott stay, the absorption of Bounty or precision of Gillette, these are brands that are the safe bet. If you elevate your history and legacy of serving customers, consumers will find the increased price worth the peace of mind.
2. **Biology and making it easier.** It's built into our biology to conserve energy and it turns out that consumers will also pay more to expend less energy. Uber reduces walking, Amazon reduces clicks and Apple reduces the steps to unlock your phone. Elevating your brand's ease with choosing and using can be a significant premiumization driver.
3. **Economics and innovation.** Human beings are continuously reinventing the world around them by adding, changing, innovating and improving. As brands and products advance, people advance. Tide removes stains better, Nike shoes help us run faster and products that never existed actually enhance our lives. Innovation is a direct route to charging more. However, the focus to premiumize with innovation is to add perceived value without layering on costs.
4. **Cognitive psychology and pleasure.** The psychological sciences have demonstrated our need for pleasure and when the opportunity arises, people will even pay for it. Brands that go beyond mere function and the job to be done to create an emotionally charged experience can reap the additional rewards of premiumization.
5. **Social psychology and enhanced image.** We have a social need to not only fit in but also stand out amongst our peers and so consumers will pay more to look good. Brands that help signal their customers' higher social status when using their products simply can charge more. This is not just restricted to clothes and cars; anything that is visible and can be seen is fair game. The water bottle people see in my hand, the dish soap people see on my counter – all can unlock price increases.

Figure 1



Key insight: Premiumization bends the traditional rules of pricing by broadening the concept of value. To unlock, first identify untapped paths to premiumization for your products that consumers value, especially those your competition has not yet identified. Next, position your product along the value dimension.

Comparison to an alternative

One of the most robust findings in behavioral science is that consumers use reference points in making choices. A reference price, an internal standard against which observed prices are compared, is the basis for which value is perceived. Something is only expensive, cheap or "worth it" in comparison to an alternative. For example, a Heineken may be expensive if I compare it to a Bud Light or Pabst Blue Ribbon but Heineken may be cheap if purchased at a Walmart compared to a Ritz-Carlton.

What is interesting about reference points is that they are unstable, dynamically shifting based on the situation and context and they can be quantified and influenced. Reference architecture deliberately influences reference points (points of comparison) to drive premiumization. There are four broad ways to architect and influence reference points:

Change positioning. Value perception is centrally linked to the product offering, which means better products are perceived to be of high value. By changing the positioning, we can alter the reference for value perception. Many legacy brands have trusted-and-loved products but could use a more relevant positioning to drive price premiums. Colgate, for instance, is positioning its brand and products along the sustainability trend to drive premium prices; Campbell Soup is shifting from preservative-laden to a premium and healthy home-cooking alternative to command higher prices.

What premium positioning can command a higher price point?

Change packaging. The visual appearance of a product is the dominant sensory reference point for comparisons. Among a category of choices, the features of the package (shape, size, label, contour, text, symmetry) convey the value proposition. How can we make the label drive the value of the product category? Kind Bars, for example, added the transparent window to give consumers a preview of what they buy.

What package designs can command a higher price point?

Change context. When I moved from Miami to New York City, paying twice the amount for rent became normal. The same goes for our in-store products on shelves and in e-commerce. The context or location creates the reference prices that influence willingness to pay. A cleaner sold at Walmart as opposed to Whole Foods will have different reference points and hence prices. Aerosols are moving from the air care aisle to home décor to more easily command premiums as average selling prices in this category as a whole are higher.

Which premium location can command a higher price point (new store, new aisle, higher shelf, middle shelf, online)?

Change comparisons. Left to their own devices, consumers will typically compare with their past purchases or with what's in the immediate environment. However, brands can proactively encourage new and more expensive comparisons to premiumize and get customers to pay more. "It's not delivery. It's DiGiorno." makes the price of frozen pizza look like a bargain compared to delivery pizza; Nespresso may be expensive compared to other brands but next to Starbucks, it's cheap.

Which premium comparisons can we seed to command a higher price point?

Key insight: To bend the rules of pricing, we must change the reference points to enhance the willingness of customers to pay more for your products. Reference points are not static comparisons to competitors' prices but are constantly evolving based on the situational context and decision dynamics. By architecting the reference points, we can drive a higher willingness to pay.

What comparisons can we use to make the product be perceived as more valuable?

Optimize premiumization potential

Classic pricing research, such as conjoint analysis and willingness-to-pay experiments, typically forces consumers' attention to a price, which is not representative of the real world. Premiumization pricing research, based on actual decision-making, replicates the real-world decision context to optimize premiumization potential. Simply put, we are looking to identify what optimizes customers willingness to pay.

Let's look at two aspects of premiumization testing.

The key distinction of premiumization testing is it is experimental (randomized, monadic design) and strategically implements reference scenarios consumers use to make decisions that can drive a higher willingness to pay. Testing in context brings in reference prices to understand the decision dynamics that can influence these higher premiums. We can break down the premiumization potential methodology into two components: independent variables and dependent variables.

Independent variables – randomized in-context experimental research design. Consumers are randomly assigned to a shelf set with product placed within the purchase context as well as competitors and prices. Each shelf set is typically identical except for price changes. By having each consumer randomized to only one shelf set, we enable the ability to compare between shelf sets to see which price drives highest choice share.

Behavioral choice dependent variable. By using a behavioral choice lottery where respondents have the opportunity to win their actual choice, we can create a scenario in which they have a skin in the game while providing a more realistic proxy for purchasing behavior. The lottery choice process involves realistic choice options including the competitors and options to not choose.

Let's look at an example.

A new product was recently introduced to the market that helps prevent the risk of babies developing food allergies. We were interested in understanding the best retail location to drive adoption and command a premium price tag. We developed shelf sets for each specific location that we were considering placing the product in retail (food, formula, supplement) and included competitor products and prices. We produced the three shelf sets (Figure 2) with the products at two different price points – \$19.99 and \$24.99. (Three locations + two price points = six conditions tested.)

When we compared the behavioral choice of the new product between the six conditions, we identified the shelf location and price point that optimized choice share and profit. Interestingly, the higher price point actually drove a larger choice share. Premiumization testing ultimately helped identify the retail location to drive the largest trial (penetration) and command the highest price (premiumization).

Bends the rules of pricing

The classic approaches to managing and setting prices have limited the growth and competitiveness of brands. Premiumization, the process of getting customers to pay more for brands and products, bends the traditional rules of pricing by understanding the underlying psychology of why customers are willing to pay premiums. By implementing the five paths to premiumization – the safe bet; make it easier; more innovation; memorable experience; and enhance image – brands can enlarge customers' perceived value without driving up costs.

Instead of reactively setting prices based on outdated conjoint analyses or asking customers their willingness to pay, start proactively identifying mechanisms to drive price premiums in your categories. The key to growth with premiumization is not following the textbook rules of pricing but rather knowing the exceptions to the rules which will help get brands ahead.

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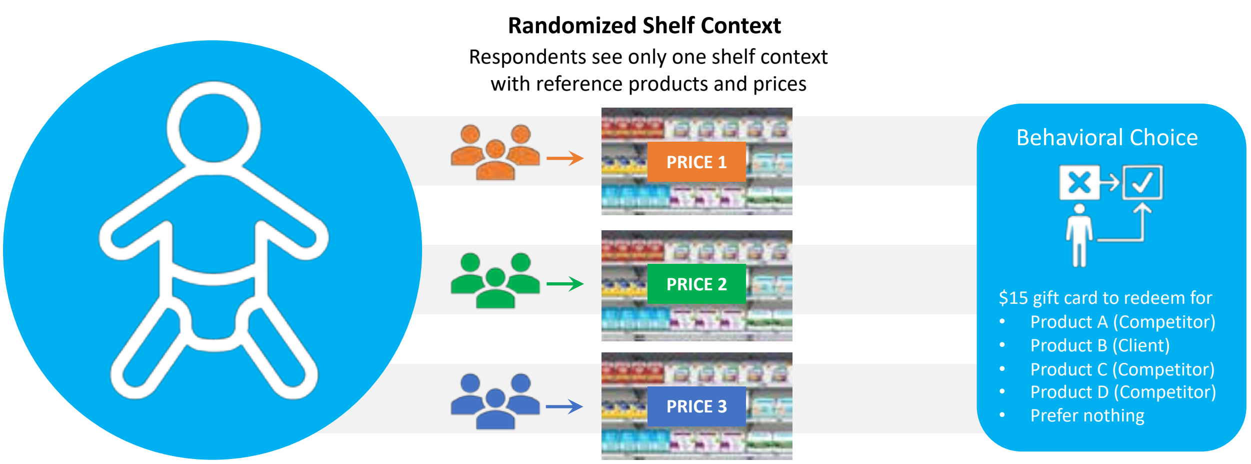
Figure 2



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ad research

Here to help

Advertising in the time of coronavirus

| By Charles Young, Emily Higgins, Richard Bilbee and Russ Turpin

snapshot

The authors use a successful Walmart ad to explore what kinds of messages can resonate during the pandemic.

We are all living through a dangerous and economically disruptive time – a time we will remember for the rest of our lives. We must focus on the health and safety of our family, friends, co-workers and fellow citizens first. But as businesspeople and, in particular, as brand stewards we must also think of the needs of our customers. So now is a good time to reflect on what your brand means. What does it stand for in the hearts and minds of your customers?

Brands are marks of trust and are familiar touchstones in our lives. They provide continuity of experience so that whatever changes tomorrow, brands provide an emotional anchor to our past selves. All of these things are terribly important while COVID-19 sows fear and doubt.

Some may suggest that remaining silent and waiting for current events to blow over is the best thing for a brand-advertiser to do. But there's truth in the saying that you find your real friends in times of trouble. Silence

Brands cannot talk about themselves or play the hero of the story. Rather, they should play a supporting role in any communications. To do otherwise would be seen as a form of profiteering.

Figure 1

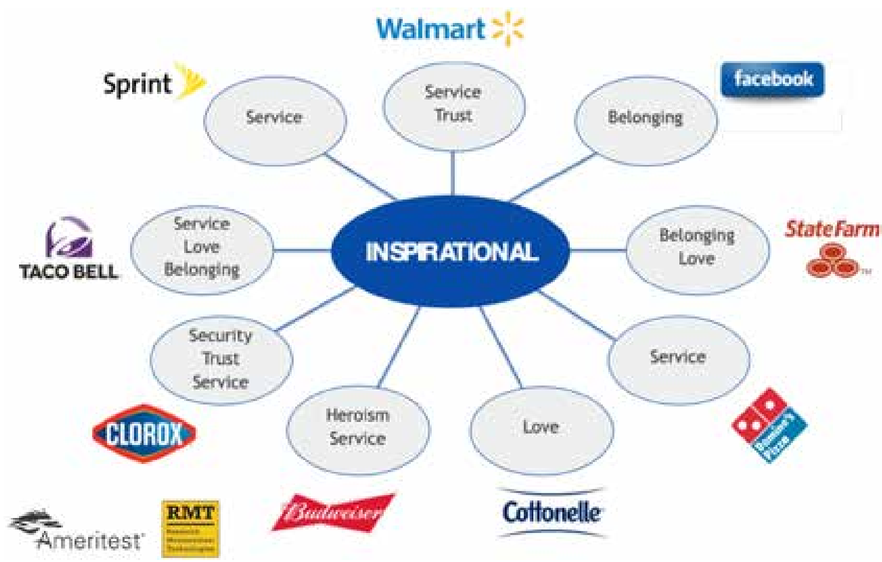


Figure 2

Brand	Share-of-Voice (of the 9 Ads)[1]	Share-of-Memory (of the 9 Brands)[2]	Quality Difference:
Walmart "Heroes"	11%	39%	+28pts
Facebook "Never Lost"	2	11	+9pts
State Farm "New Normal"	28	21	-7pts
Domino's "Delivery Business"	23	18	-5pts
Cottonelle "Share a Square"	14	0	-14pts
Clorox "Help Spread Protection"	6	4	-2pts
Taco Bell "Drive-thru"	1	4	+3pts
Budweiser "One Team"	1	0	-1pt
Sprint "Our Priority - Safety"	14	4	-10pts
$75.5 Million spent for these ads			

Ameritest

1: Media spend provided by: iSpot.tv
Share-of-Voice is based on impressions

2: From Ameritest Tracking Study:
Percentage of spontaneous brand mentions when asked "Please think about all of the ads you've seen during the COVID-19 pandemic. What brands do you remember advertising?"

leads to fear and fear isolates us from each other more than quarantine, so now is exactly the right time to reinforce the power of a brand to connect us to each other. Brand advertising can be a force for good in today's uncertain world.

Our advice to our clients is to do something in the name of your brand or at least find ways to be supportive of what others are doing. The key is that this requires a shift in point of view: Brands cannot talk about themselves or play the hero of the story. Rather, they should play a supporting role in any communications. To do otherwise would be seen as a form of profiteering.

The virus is a danger to our bodies, our economic health and our emotional well-being. Great brand advertising can help protect us against the last two of these three challenges.

Understand what would work best

Ameritest partnered with several research companies to better understand what advertising approaches would work best during this time of crisis. Ameritest used our brand advertising research system, called BARS, to link together ad-testing measurements with in-market tracking and brand image performance. We conducted 2,000 online consumer interviews with sampling help from research company Dynata. We collected media spending data from iSpot TV to measure share-of-voice and compare it to share-of-memory results. And we used DriverTags from Research Measurement Technologies to link the meaning of key advertising visual elements back to advertising ROI.

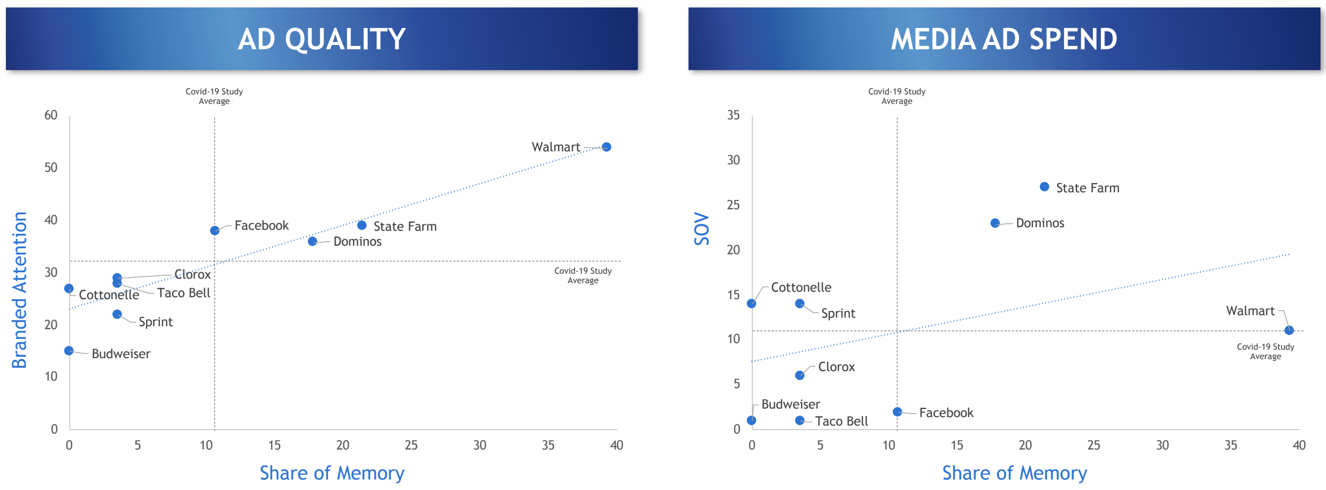
As of the middle of May 2020, advertisers had spent a total of $1.7 billion on COVID-19-related advertising across 595 brands in 15 industries with 1,186 TV commercials. Our study looked at a subset of these, across nine major advertisers who spent $75 million over the preceding three months. Here is what we learned.

Collectively, this set of nine ads might be thought of as a virtual campaign that all serve the common purpose of inspiring and lifting the spirits of the American people. But each individual ad does so with a distinctive point of difference.

The data behind the brand wheel in Figure 1 comes from Ameritest's live-market ad-tracking research that uses key-frame storyboards built from the peak images in each commercial to measure awareness and recognition. Key images are identified by our ad-testing product as those that garner the most attention and emotion.

Not surprisingly, some ads worked harder to engage consumer attention and had more of an impact on branded memory. And this effect is not just because of differences in media spending

Figure 3



Branded Attention → Share of Memory

$R^2 = .85$

Share of Voice → Share of Memory

$R^2 = .18$

Ameritest Testing and Tracking

Figure 4

Brand	Attention:	Brand Linkage:	News:	Message Importance:	Music:
Walmart	60	90	46	73	68
Facebook	46	83	32	71	58
State Farm	43	91	46	66	73
Domino's	40	90	62	57	76
Cottonelle	37	73	68	66	58
Clorox	32	91	40	79	52
Taco Bell	30	93	43	58	59
Budweiser	25	60	52	66	64
Sprint	23	96	48	49	46
COVID Avg:	37%	85%	49%	64%	59%

among brands; differences in ad quality make a much larger impact (Figure 2).

This research confirms (once again) that ad quality makes more of a difference than the amount of media dollars spent (Figure 3) or media share-of-voice garnered when it comes to having an impact on each brand's share-of-memory (measured as unaided awareness).

There were various reasons for differences in ad quality, which is measured by branded attention. Some ads contained more news, such as the Domino's announcement of "contact-free" pizza delivery or the Cottonelle announcement that we're not going to run out of toilet paper. Some ads leveraged inspirational music, while others reinforced important messages: Clorox lectured us on the importance of regular cleaning and Facebook reminded us that "we're never lost if we can find each other."

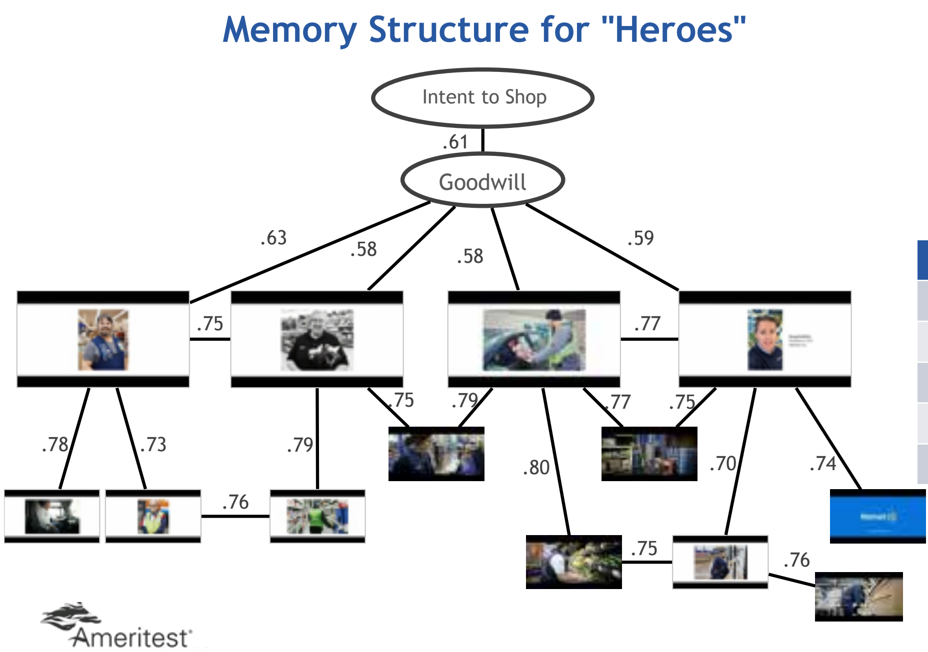
But Walmart outperformed all others across all key performance metrics (Figure 4) with its Heroes advertisement. It celebrated the 1 million Walmart employees who kept working to keep the shelves stocked during the crises.

The key metric that we look at when measuring the net effect of all marketing activity in a category at any given point in time is the ratio of share-of-memory to share-of-voice. This ratio is a simple and fast-moving leading indicator of marketing performance. It's the first measure to go up when your advertising is working to grow your brand. It's also the first do go down when share-of-market starts to decline. A ratio greater than 1 means a brand is efficiently leveraging the money invested in media with high-quality creative.

The ratio of share-of-memory to share-of-voice for the Walmart ad was 3.5, well above the scores of the other COVID-19 ads, which mostly scored below 1. Walmart amplified the impact of its media spend on consumer memory by over three-and-a-half times because of the quality of its ad.

So, with one genius marketing move and one home-run ad, Walmart used the crisis to successfully reposition its brand from being a store that sells lots of stuff at everyday low prices to being perceived as a service company you can trust. By doing this, it is continuing to very successfully compete with its archnemesis, Amazon.

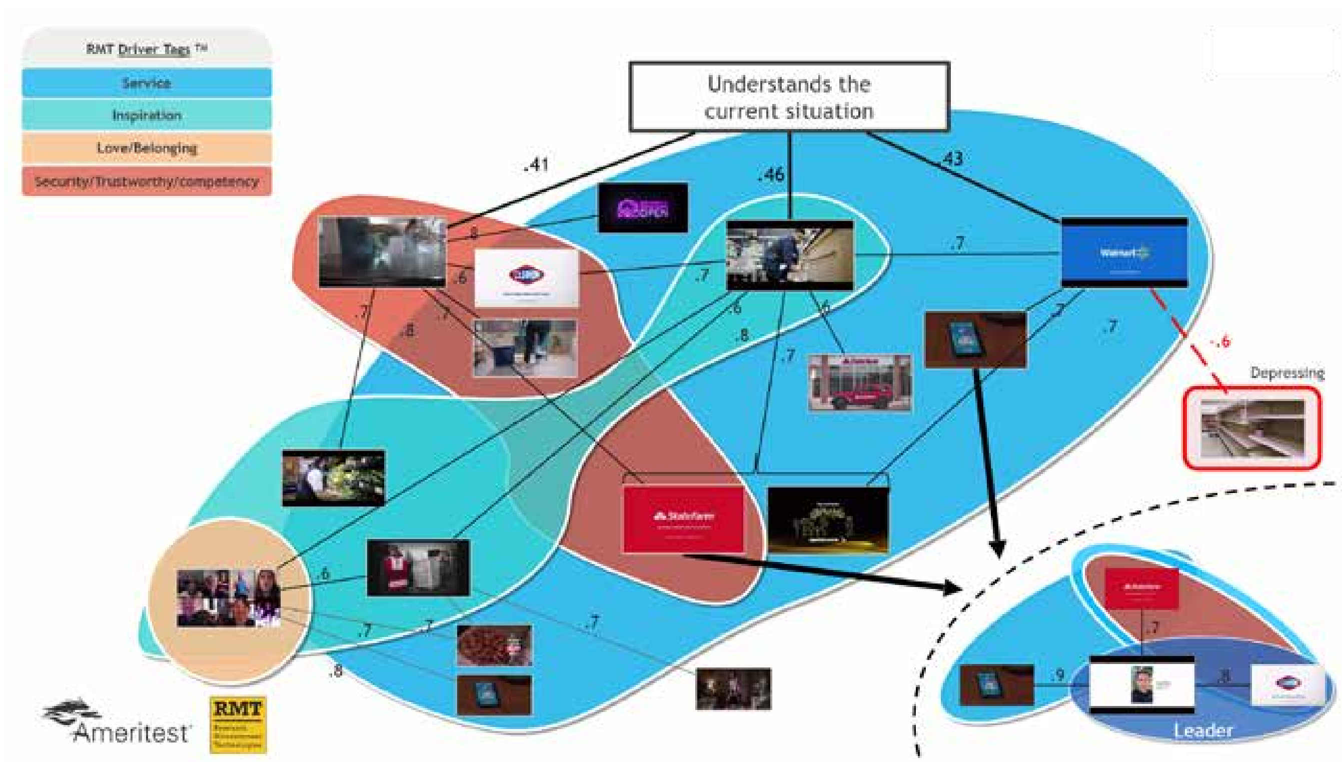
Figure 5



Walmart

Top Meanings for these images:	
Supportive	31%
Confident	28%
Safe	26%
Inspiring	25%
Trustworthy	21%

Figure 6



Linked in the memories

If we want to draw a conclusion about the lasting impact of these nine ads on our shared cultural memories from this year, then we need to map the visual images together into the same network to understand how they are linked in the memories of the American TV-viewing audience.

To better think about this, there are two metaphors that can shape our understanding and insights into how memory works. The first is that memory is like a library. It's organized for search and retrieval by using a Dewey Decimal System for the mind. This is the brain of law, of logic and mathematics. It is Daniel Kahneman's System 2 memory model for the rational, thinking brain. This model helps us understand the importance of tagging experience with various word labels to help us sort experiences in various categories that can be remembered.

The second metaphor is to think of memory as a social network with images forming the nodes of the multidimensional network instead of people. This is the System 1 Memory system. It is the intuitive, irrational memory system. This model of memory helps us understand the importance of relationship, connectivity and context in creating lasting memories.

Ameritest uses a tool to map the network of remembered visual images left behind by an ad or campaign. The resulting memory maps show the linkages, based on correlated emotions, that connect the key emotion-charged visuals in a product category. These maps can be useful for revealing the entry points and visual pathways through consumer memory to drive particular behaviors, such as purchase intent, although in the case of these COVID-19 ads, the goal was to drive goodwill towards the brand (which is correlated with purchase intent).

Figure 5 is the Memory Network Map for the Walmart Heroes ad. It shows that Walmart CEO Doug McMillion is being remembered as one of the faces of true leadership during this crisis. If we look across all nine ads in this study, we can see an even larger structure being laid down in the memories of the American population. The memory structure shown in Figure 6 highlights all the memorable images and the strength of the emotional linkages between them in the minds of the audience. Images are close together in memory and some are sparsely or richly connected to other images (and thus ideas).

This is the foundational structure created by these nine COVID-19 ads that future rounds of advertising have the opportunity to build on. At the top of the map are the most telegraphic images that can communicate, in just a few seconds, that these brands understand the current situation.

Finally, in order for advertising to form long-term memories, it's not just emotional content of the ad that matters but the meaning of that content. As we peel back the layers of meanings embedded in the memory network above, we can see the need for security, trust and competence. These support the higher emotional needs of love and belonging. And, at the top of this ladder of meaning is the idea of putting service to others above service to self. It seems to us that this will be an idea that will be relevant to advertisers long after the time of the coronavirus is over.

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●●● financial services research

Maintaining their interest

Customer experience in banking and finance – the impact of COVID-19

| By Paul Child

snapshot

Paul Child takes a wide-ranging look at how service industries should approach shaping their customer experience now and in a post-pandemic world.

www.quirks.com/articles/2020/202011.aspx

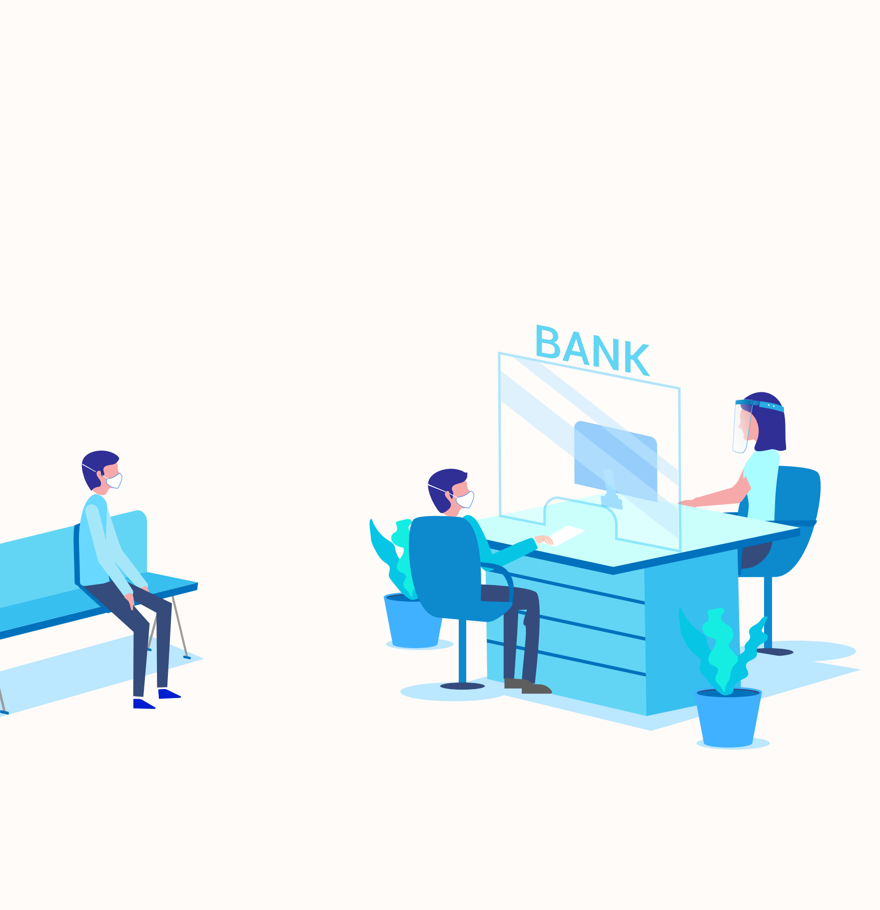
For service industries and those providing an intangible product, the customer experience has long been an opportunity to develop relationships, build the brand and encourage loyalty. But the global pandemic has put operating models under strain, challenged assumptions about value creation and necessitated radical re-thinks at speed. As the world continues to adjust to life in 2020, what have the last several months taught us about crisis response, human needs and seeking certainty in a world seemingly so determined to confound expectations?

Back in April 2019, before we'd even heard of the term "COVID-19," Edelman published its annual Trust Barometer. In it, the firm identified an ongoing rise in trust in financial services providers, but it was a rise tempered by two key facts: financial services remained the least-trusted sector within the Barometer and levels of trust diverged between the mass population and informed public, meaning that for those with less engagement in the sector, trust was lower. Fast-forward to 2020, and while the Barometer reports a rise across almost every sector in most markets measured, the sector is still in the lower half of the list.

With an already low level of trust in the sector, how can banks and other financial services providers bounce back and what cues can be taken from the past six months to set a course for recovery? With customer experience as a central theme, we draw on our observations and interactions with thousands of consumers from our proprietary online communities around the world and the perspectives of our in-house Culture + Trends team to offer some possible answers to that question.

Happen at speed

The global spread of COVID-19 has affected us all. The impact continues to be significant and severe and has yet to play out fully. In the business world, disaster recovery and radical reassessment of operating models have had to happen at speed. Necessity has been the mother of invention



"We're excited because there's never been more of an opportunity for insight to provide the illumination of these issues."

and initiatives previously thought near impossible have been activated and executed within weeks rather than months or years. The financial services sector is no exception.

Banks and insurers have mobilized new operating models at a pace previously unheard of, cutting through logistical or administrative barriers and adopting new systems, processes and approaches. Digital transformation has accelerated. From tellers equipped with tablets and inbound calls to their home phone lines, to live video consultations moving from centralized to de-centralized models. "We've seen brands mobilize very quickly and many can mark it down as an operational success," says Tom Dreaves, research director, InSites Consulting UK. "But they haven't necessarily been able to consult with customers along the way. That gap in understanding needs to be filled, as it's easy to fall into assumptions based on our own preferences and needs."

In Hong Kong, financial services firm HSBC has launched a videoconferencing service via Zoom for its high-net worth Jade customers so that they can still get advice for making informed investment decisions from an adviser they have a relationship with. Similarly, a few big insurance brands such as Prudential and AIA also launched virtual onboarding services to enable remote application for a wide range of life, savings and protection products (which previously required face-to-face interactions). Financial services providers have contributed to the effort to respond more widely too. AXA Belgium, for example, opened up its medical helplines to support medical frontline staff, an initiative that was validated using its customer community.

"In Belgium, as a corporate social responsibility initiative, we temporarily extended our telemedicine services by making them available to all the Belgians who suspected having the coronavirus," says Karel Coudré, director product management life and health insurance, AXA Belgium. "We were able to test perceptions prior to launch, utilizing our agile research platform, and do so at speed. This helped give confidence to our leadership and to our teams that the effort involved in mobilizing this initiative was the right way to go. Staying in touch with the sentiment of our customers has always been important to us but in such a fast-moving environment, being able to quickly validate their views accelerates our ability to get to market with solutions. We expect this to continue to be the case as we continue to adapt and evolve how people experience our products, services and the brand generally. We're excited because there's never been more of an opportunity for insight to provide the illumination of these issues."

But has acting at speed come at the cost of consulting with customers? Has the customer voice remained a part of those decision-making processes or has it fallen silent as speed trumps consultation? Is the AXA Belgium case an exception to the norm? And if so, how do we double-back to ensure that our innovations are appropriate for all?

Shapes expectations

To support clients in bouncing back better, we have been staying close to consumers throughout the pandemic, not only through clients' insight communities but also through our own global COVID-19 consumer community. For three months of the lockdown period, we deeply engaged with 102 consumers from 13 countries to get an understanding of the changes in their everyday lives. We consciously extended our ongoing dialogue with consumers, to dive more deeply into their experience of the pandemic and how that shapes their expectations and needs both during and emerging from various states of lockdown and restricted movements.

As professional people observers, we are well aware of the concept of hierarchies of needs and wants and the notion of rationally or emotionally driven actions. Dealing with both emotional and practical issues, people have been reporting a sense of lost control and disempowerment. Governments and health organizations have stepped in to set the tone and establish a course of action, affecting individuals and businesses and shifting people's circumstances almost overnight. "People have been through so much in such a short space of time, and often found themselves experiencing major highs and lows in the space of a day. The lack of the familiar has really challenged people's instinctive decision-making," says Peter Latham, Culture + Trends consultant, InSites Consulting.

On the emotional front, there is the loss of the familiar, an initial period which seems comparable to the curves seen in post-traumatic recovery. People think through every action and reaction – instinctive decision-making is much harder as the familiar recedes from their gaze. Even the usual is unusual: mental fatigue from video-calling as our familiar senses when seeing people all send signs that something is not quite normal. (Why can't I sense them fully as I would if I were seeing them normally?) The lack of physicality presents cognitive dissonance.

The fundamental drivers of protecting our health and wealth kick in. Are our families okay? Is our immediate bubble protected? Do we have what we need financially to maintain their safety and well-being? What are the processes to access help and support? Who around me can I help?

We adopt coping mechanisms. Reading through feedback, watching video diaries and observing people as they navigate their lockdown lives, it becomes clear that people are establishing small routines or mental hacks to keep themselves positive in outlook.

We have also observed this mood of collectivism and goodwill dissipate over time. Containment begins to breed resentment; those who aren't following the rules or seem to regard themselves above it are called out. Frustration spills out into everyday interactions leading to friction points for frontline staff. People start to look for allocation of blame and perpetrators of perceived transgressions are held up as setting bad examples.

On a practical note, old routines are thrown out or relearned for a pandemic setting. Shopping for essentials, your ability to roam and how you spend your time at home all shifted considerably. Some were coping with empty nests refilling or timetabling for home-schooling. Others were faced with isolation and loneliness, cut off from friends and family. Baking, gardening, home improvements. Social media, news. Spikes in the purchase of home gym equipment, home technology like TVs, all indicated the habits we were adopting at home.

And of course, this starts to unveil new expectations around service and access to services. Online or remote access increases in prominence. Grudging adoption turns to an appreciation of the convenience and some talk of adopting new channels or fulfilment modes even when things return to normal. But as time extends, a sort of mini-nostalgia emerges. And as we come back out, are some of these things relics to a time we'd rather not dwell on? Does the queuing at non-essential shops, the crowded bars, the beaches, the nightclubs and the drive-in gigs actually represent a desire to reassert a normality based on how things were before?

Not in the same place

As one of our clients commented in April: "The million-dollar question is: How can we be ready for the recovery phase?" In preparing for what comes next, there seemingly is a fragility to the uneasy harmony we've attempted to reach in reconciling ourselves with our situation. The reflection back to pre-COVID-19 suggests a desire to return to the familiar. It is also clear that not everyone is in the same place as to their perceptions of the recovery curve.

Returning to the fundamental needs for health and wealth, there is an emergent tension between those who remain fearful and prioritize the health of themselves and their family. They see scenes of crowds as creating risk and those flouting distancing rules as irresponsible. They lament the contradiction of having maintained strict regimens, sometimes at significant emotional cost, only to see it being potentially sacrificed by others.

For these people, prioritizing safety, health and well-being in public spaces will be key. The experience must have health baked-in and active, visible management of risk will provide reassuring positive friction. They will likely tolerate additional steps and processes and may become concerned where these are not consistently applied. Indeed, it's already becoming apparent on social media that this could become highly proactive – challenging others about their behavior that is perceived as creating risk for all. Even our creative network, eÿeka, prioritized hygiene and well-being solutions when asked to help consumers live in a post-COVID-19 world. We presented this challenge to the eÿeka network in the form of an open contest asking creatives to help brands prepare for the new normal in a post-COVID-19 world, specifically addressing what sorts of products and services consumers will look for; and how brands can evolve to provide for those needs and help consumers leave their homes "with caution." In 12 days, the contest generated 142 ideas from 77 participants in 35 countries.

There is also appetite for clear, concise instructions. Signage and navigation should be easy to interpret. Practical messages are likely to find favor and the channel that offers safety

> "The million-dollar question is: How can we be ready for the recovery phase?"

and efficiency will win out. Physical in-person channels will be approached with caution but if expectations are set, well-managed and the experience is safe, it will likely be received positively. As one consumer in the Philippines, aged 56+, said: "For as long as no vaccine or cure is invented or discovered, businesses should see to it that the guidelines of the health organizations and the government are followed and that consumers are helped to observe the guidelines too."

At the other end of the gradient are those desperate to leave the confinement of home. Reporting a desire to reenter the world that is as much a push as it is a pull back to normality. They reconcile themselves with the message of the risk having passed, that the signal is that, in the main, life is returning to normal. Caution should be applied but they are ready to heed the call back to the places they went before. "Would love to go to my favorite department store with my mother and just spend a nice time there watching the collection and sit down for a cup of coffee," said a consumer in the Netherlands, aged 25-39.

There is a desire here to make up for lost time. There could be frustration over measures that are seen to exceed what is reasonable and present unnecessary delay. Any ways to reduce wait times or minimize time spent waiting will be welcomed – and could be benchmarked against other experiences both online and offline. Actively managing expectations and mood amongst those engaging in face-to-face settings will be key, as will the continued ability to service needs remotely.

Early indications are that tension will manifest itself as these two groups meet and mix in public settings. We need to be prepared to design our experiences in a way that caters for both. Innovations in experience design are already appearing and the introduction of in-situ entertainment, borrowed from theme parks, or drive-in servicing that lets people remain protected in their vehicles, perhaps point to some of the future experiences we will all have. Immediate revisions will be to move to a contactless environment, utilizing technology as part of the experience to allow for interactions to involve as little touching of surfaces or possible transmission or relay of disease as possible.

In a world where physical manifestations of brands such as branches and shops are having to be reimagined, revisions to channel strategies are high priority. Those who foresee an all-digital model were quick to predict the pandemic as the herald for this all-encompassing revolution. But the role of a bank branch, or any face-to-face interaction, can be much more than a functional facility to perform a transaction. It offers the opportunity to provide an experience to connect customers to your brand and also provides familiarity and a setting appropriate to certain types of conversation. Given the sensitive nature of an increased number of people post-COVID-19, the role for in-person human interaction should not be underestimated.

With the possibility of local-level responses to outbreaks coupled with the reengagement in the locality promoted by time in lockdown, the ability to localize responses and relate that to customers will help establish empathy.

Bring agility

The most successful brands will bring agility to the heart of their business, beyond digital and innovation to their channel mix, how they manage demand and supply and even physical space. Now is the time for "sense and respond" in order to really drive response. There is a chance to coauthor the future with your users, customers – those who experience your services – building in and encouraging empowered agility and driving decision-making to the frontline of your organization so that local interpretations can be made and advantage taken of specific settings and locales.

"We know the world will be even more complex and many businesses are preparing for how to remain responsive to people's needs at speed. They'll need to balance the needs of staff, customers and the business while remaining responsive to the landscape set by government and the global economy," says Christophe Vergult, managing partner, InSites Consulting.

Reassessing the spaces that have been designed to make interactions less formal has led to challenges when faced with ensuring the well-being of staff and customers in a post-pandemic world. De-formalizing spaces, removing barriers to interaction and opening up banking spaces to create a less intimidating, friendlier version of the austere banks of old also creates spaces rife with disease to spread if not carefully reconstructed.

Lessons may need to be drawn from other sectors, where agility has been applied to physical spaces as well as working practices. For example, the yoga studio in Hong Kong that has fitted portable plexiglass to create on-demand spaces and shield individuals but which can be reconfigured to create an area where a small group can gather while adhering to local guidelines.

Banking and finance brands must now utilize their channels, often in combination, to best provide an experience that: provides individuals with a sense of safety both in-branch and online; offers empathy towards consumers' financial circumstances through actions as well as words; contributes to the collective recovery, at both local and national level; does not seek to take advantage of the circumstances; and stays attuned to the customer mood.

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••• the business of research

Change their perspective

Moving insights from cost-center to strategic partner

| By Fran Guzman

snapshot

Kraft Heinz researcher Fran Guzman offers some guiding principles to help insights teams succeed.

Given corporations' goals to be consumer-led and the function's inherent capability to gather, analyze and interpret data, consumer insights is aiming to reposition itself from being seen as a cost-center to being a source of competitive advantage. Insights is no longer just focused on mitigating risk but also on driving strategic agendas to unlock growth. The function is increasingly playing a key role beyond just marketing.

After working on various strategy initiatives representing the voice of the consumer and assisting with research, I've identified some guiding principles to help insights teams succeed. The principles outlined below revolve around the areas the function has the most influence and involvement in: framing the business problem; data collection and analysis; and recommendations.

Framing the problem

Whatever the corporate strategy initiative may be, start by positioning it as a problem. That way, your task becomes to find a data-informed solution. Something that can be fact-checked. This allows you to develop various hypotheses to identify the "real" problem. It also provides a roadmap for research and analysis you need to vet the hypotheses quicker and to do so simultaneously.

Which problem you frame and how you frame the problem are key considerations. Ideally, you should be able to frame your problem very succinctly. For example, if I'm a restaurant brand with declining sales (compared to last year) you can probably frame my problem as Why did sales decline and what should I do now? Framing the problem correctly takes time, though, and you need to ensure you work on the right problem.

Focus on understanding the key drivers of your problem – aim for depth instead of breadth. There may be five to 10 reasons why sales declined compared to last year for our hypothetical restaurant. However, based on research with lapsed users, you know that the increasingly saturated market, the brand's outdated product offerings and poor customer experience are the biggest reasons why consumers have stopped visiting your brand. Start with those as your initial leading hypotheses and let your data analysis prove or disprove them.

Work on the right problem. Capture the essence of the problem, because in the end, you'll seek what you set yourself to seek. Do not accept the consensus of what the problem is at face value. Continuing with the restaurant example, the drivers outlined assume that sales declines are due to a drop in customer visits. However, it could very well be that the sales declines are actually due to a drop in average spend per visit and not a drop in traffic. The hypothesis-driven problem-solving framework helps you identify the right problem.

Frame questions, not statements because questions lead to new thoughts. A statement like "Same-store sales are down" focuses thinking around things not going well while a question like "How can we grow same-store-sales?" encourages solutions-based thinking.

To drive actionability, know the limits of data analysis. Draw the inferences from the analysis within the business context in which you are operating.

Data collection and analysis

Once you frame the problem, you know the questions to ask and the data to get. This is the section that insights can impact the most. Outside of managing the technical aspects of the research, the function can also drive action.

Triangulated data trumps precise data. The rise of big data has led to a fear of missing out on some big insights because you are not analyzing all the data or lack the "right" data. Thus, a large chunk of time is spent trying to find and clean the data. Instead, triangulate data points to answer key questions.

In the restaurant example, one of the questions you'll need to answer is, By how much have sales declined? You'd probably prioritize point-of-sale data but as many know, these systems are riddled with issues: connectivity, software problems, inaccurate reporting, etc. Don't spend time getting a singular source "right." Instead, use your brand health tracker and a consumer panel that also tracks spend per trip via different methodologies. This provides more confidence in your answers and allows you to move quicker.

So what? As you analyze research results, focus on what helps you prove or disprove a hypothesis. Many times, research share-outs are summary reports instead of an overview of the implications for what you are trying to accomplish. Don't be distracted by interesting facts or cool chart graphics; focus on the data that gets you to the solution.

To drive actionability, know the limits of data analysis. Draw the inferences from the analysis within the business context in which you are operating. This is the phase where intuition takes the lead from data. In our example, if you determine that declining sales are driven by traffic loss and that that is due to your restaurant being further away compared to competitors, your recommendation must fit the business realities. You would not likely recommend building additional locations, given how cost-prohibitive that is. A more likely recommendation would be to make the brand more accessible via a delivery platform that incorporates loyalty programs.

Don't make the facts fit your solution. Be prepared for the data analysis to prove your hypothesis wrong, no matter how brilliant or spot-on you think it may be. If the data does not support your hypothesis, it is the hypothesis that must change, not your data. Do not manipulate data to tell a different story or work backwards to get the "ideal" data points that support the solution you or leadership may want.

Recommendation

After all the hypotheses you vetted, the dead-end questions you explored to get to the right questions, the various research studies, the continuous data analysis and the pressure-testing of ideas, you are finally ready to put it all together. Many focus on documentation instead of pitching an idea that you want your audience to approve and implement. Outside of basic presentation etiquette and organizational norms, you can take steps to ensure it runs smoothly.

Shop around your solution. Walk relevant decision makers through your findings and recommendation, prior to the official presentation. This keeps you from getting blindsided by major objections, helps build consensus for your solution among decision-makers and, most importantly, gives you time to adapt your solution as needed.

Use the presentation as a pitch. While you may be confident in your analysis and solution, you still need to convince your audience that your recommendation is the right action. Keep in mind that they are typically senior leadership who have commissioned the project but have not worked on it as closely as you have. The presentation is a tool to bring them along and excite them about the solution.

Structured and simple. You should walk the audience through the project from soup to nuts during the presentation. Summarize the problem, provide business context, assumptions, frameworks, project milestones and the overall approach that got you to the solution. It should be so structured and simple that you could develop an elevator pitch for this project.

Your presentation should be crisp and clean. To be most effective at conveying information, have one message per slide and avoid complex charts. The meaning of the charts should be immediately obvious. If you need to explain, you lose the audience on technicalities. Focus on the information that supports the recommendation.

Getting there is a process

Corporate strategy development and implementation is resource-intensive, data-driven and complicated. However, the insights function's consumer knowledge and data analysis abilities make them an asset on these project teams. This level of work also gives insights a competitive advantage by making strategic research a priority, embedding insights across functions and building an enterprise-wide knowledge base. The true impact of a best-in-class insights function is invaluable but getting there is a process. Increasing involvement in these types of projects is a move in the right direction. Insights teams that ensure they are value-adding partners put themselves in an ideal position to continue being central to their organizations' strategic planning.

Fran Guzman is consumer insights and strategy lead at Kraft Heinz Company, Chicago. He can be reached at fwguzman@gmail.com.

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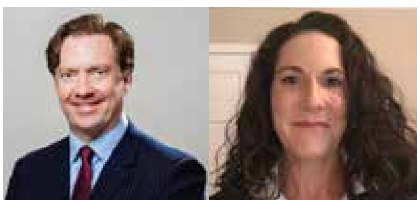

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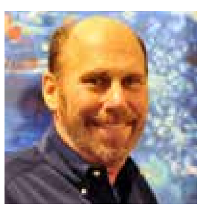

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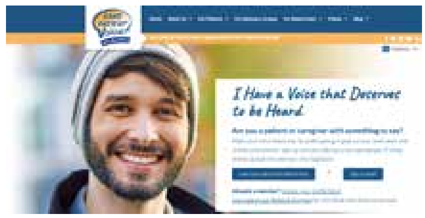

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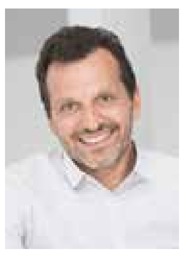

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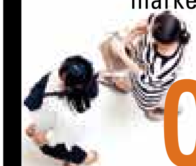
THE Q REPORT

An independent study, written for and developed with the help of client-side marketing research and insights professionals

QUIRK'S MEDIA



CORPORATE **RESEARCHER** REPORT 2020

DISTANCED but DETERMINED

Welcome to the seventh annual Quirk's Q Report!

2020 is obviously different from any other we have faced in recent memory. Past editions of the Q Report have taken a broader view of researchers' work lives but this time around we felt it made sense to focus on COVID-19 and its impacts.

Thus the survey the report is based on looked at the pandemic's effect on budgets, hiring, the tools and methods being used, the changes that COVID-19 has wrought, the best and worst outcomes of the virus and respondents' general takes on their chosen profession. We skipped the salary and compensation portion this time around, figuring the data would be just too skewed by the current reality.

The purpose of the report is to give corporate researchers (those whose job it is to gather, analyze and disseminate insights about their organizations' customers, products and services) an in-depth look into their world, helping them learn more about what their peers and colleagues are doing and also benchmark themselves and their departments.

The 2020 Q Report work life study of corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research end-client subscribers of Quirk's. The survey was fielded from July 29 to August 12, 2020. In total we received 463 usable qualified responses. An interval (margin of error) of 4.5 at the 95 percent confidence level was achieved. (Not all respondents answered all questions.)

We want to thank all of our client-side readers who took the time to complete the survey and provide their candid thoughts.

We also want to thank our content partners for sharing their industry insights. Confirmit offers tips on prioritizing innovation. Insights Now takes a deep dive into COVID-19's impact on consumers' product choices. Perksy explores how brands can talk to Gen Z. Quantilope examines how to leverage quantitative insights. SurveyMonkey Market Research Solutions reports on its survey of market research pros and their use of DIY tools. Toluna looks at the value of collaboration. And Decision Analyst makes a case for marketing research's ability to lead us to a brighter future.

We hope you find this report useful. Please let us know how we can make next year's edition more informative and valuable to you.

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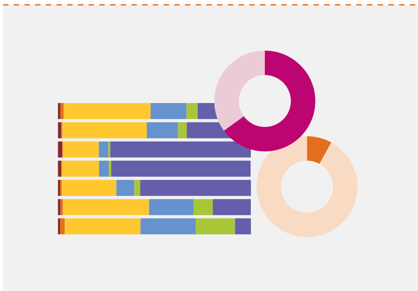

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QUIRK'S MEDIA

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from **QUIRK'S**

'IN ORDER TO CHANGE DIRECTION, WE MUST HIT A WALL FIRST!'

Researchers, facing pandemic, are undaunted, ready for the challenge

By Joseph Rydholm, Editor » Quirk's Media

Resilience is a something we've all had to exhibit lately, as the pandemic and its associated effects impact us in ways that seem to constantly change. Beyond the chaos visited upon our day-to-day existences, our professional lives have been upended. Most of us are now working from home, engaging with customers, colleagues and friends over Zoom calls. Sometimes that's great. Other times it sucks. But, thanks to resilience, somehow we're managing. That which does not kill us, right?

Researchers are doing better than just managing, according to findings from our annual Q Report survey of client-side insights professionals. And while it would be an overstatement to say they are thriving, in reply after reply to the many open-ends we asked in this year's iteration of the survey, they expressed optimism, pride, excitement and almost a sense of renewal even in the face of a worldwide disaster.

Recognizing 2020's unique circumstances, we scrapped our usual approach for this year's Q Report survey, replacing questions about salary and compensation and other aspects of life as a researcher with a focus on life as a researcher during a pandemic, with liberal use of open-ends to let respondents tell their stories in their own words.

The 2020 Q Report work life study of corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research end-client subscribers of Quirk's. The survey was fielded from July 29 to August 12, 2020. In total we received 463 usable qualified responses. An interval (margin of error) of 4.5 at the 95 percent confidence level was achieved. (Not all respondents answered all questions.)

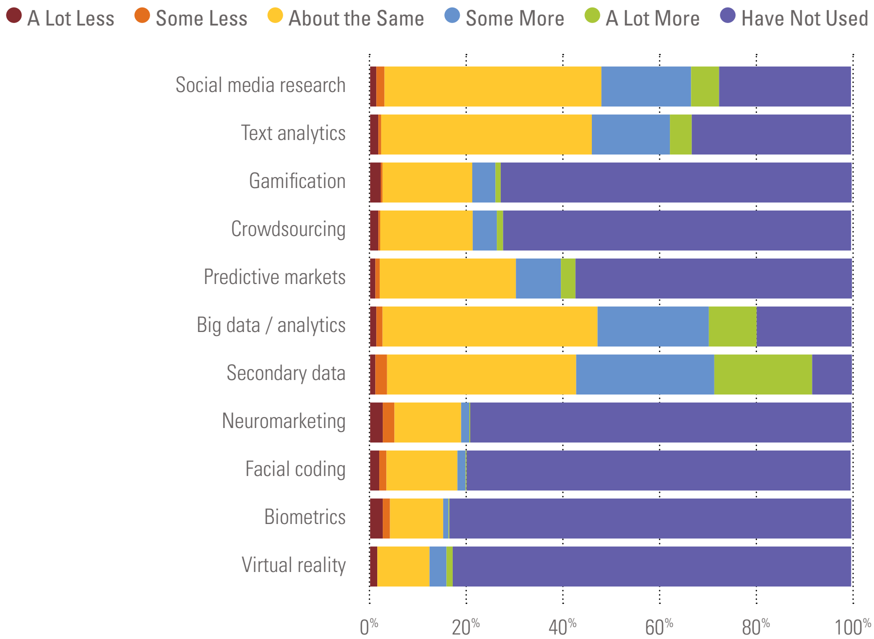
51 percent reported a cut in pay

We started the survey out by trying to get a handle on the pandemic's impact on readers' salary and work hours. Of the 100 responses we received to the question, "Which of the following apply to your employment since the COVID-19 crisis?" (my pay has been cut; I have been or am furloughed; my hours have been reduced), 51 percent reported a cut in pay; 34 percent said they have been or were currently furloughed; and 15 percent reported having their hours reduced. (Multiple responses were accepted.)

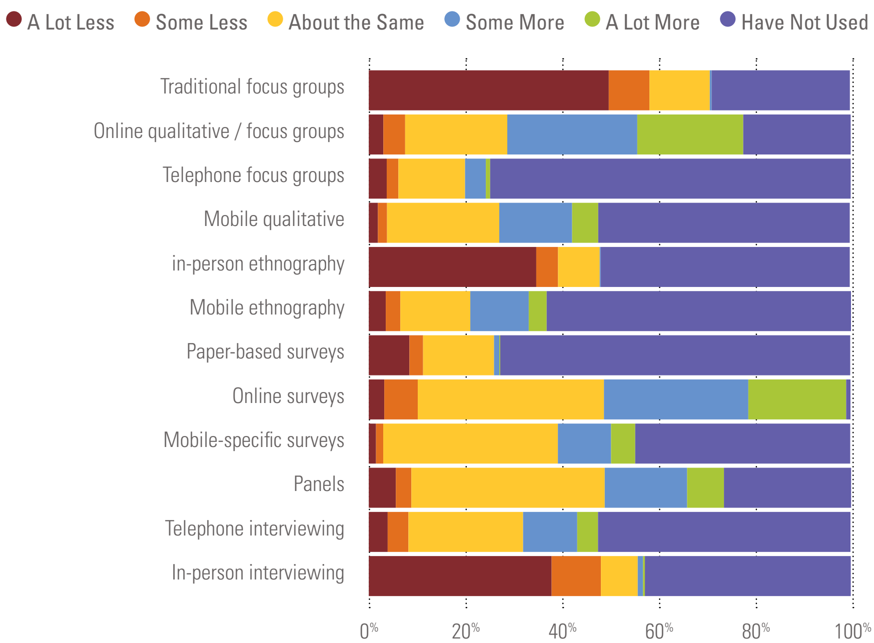
Next we asked about staffing levels and, perhaps surprisingly, 76% said their staffing levels have stayed the same. Just over 6% said the levels had increased and 17% said levels had been reduced through permanent job cuts, furloughs or hour reductions.

Those numbers were generally echoed in the range of comments on staffing. Hiring freezes were frequently cited. There were many mentions of being overworked and understaffed. Some departments had furloughs or forced vacation but are now coming back to full

As a result of COVID-19 is your company doing more or less of the following?



As a result of COVID-19 is your company doing more or less of the following?



strength. There have been permanent reductions in staff along with a few staff expansions and multiple respondents wondered aloud about possible reductions to come later in the year if the virus's effects linger.

To get more clarity on the hiring plans we asked how likely it was that the organization would hire additional MR employees in the next 12 months. Some variation of "unlikely" drew the highest percentages – 36% very unlikely; 17% unlikely and 6% somewhat unlikely – while the "likelys" as a group only mustered a collective 23%.

Related to staffing, of course, is budget and we asked how the budget or spend on MR had changed in 2020 due to COVID-19. About 45% said their budget had stayed the same. Just over 30% said their budget had decreased by more than 10%. Ten percent said they had seen a decrease of between 5% and 10%.

Of those who reported increases, 3% cited a budget rise of less than 5%, just under 4% cited an increase of between 5%-10% and just 2% enjoyed an increase of more than 10% in their insights budgets.

So, which techniques are those budgets being used on? We asked identically worded questions about two broad groupings of techniques (see accompanying charts). The first grouping encompassed techniques that are more widely or commonly in use. There, panels, online surveys and mobile-specific surveys scored the highest percentages of those reporting the same usage levels. And while traditional focus groups, at almost 50%, earned the highest "a lot less" usage percentages – along with in-person interviewing (38%) and in-person ethnography (35%) – online qualitative/focus groups earned a combined 47% "some more" or "a lot more" usage, so it's clear that the problem lies with the in-person aspect of qual, not the techniques themselves.

In-person declines

Among the second grouping of techniques – generally those that are newer and/or less commonly used – secondary data earned the highest combined percentage (nearly 50%) of "some more" or "a lot more" usage, a finding that was borne out in several open-end comments. While the sheer volume of COVID-19 "reports" being issued by seemingly every research company in the world this spring took on its own virus-like aspects, apparently the onslaught was warranted, as our survey clearly showed a thirst for that kind of information among client-side researchers. Many respondents mentioned using the reports and other secondary sources to help get a big-picture handle on what was going on with the world in general and their consumers in particular.

> *I've gathered and synthesized more secondary research during the last few months than I have in years to help the organization better understand the state of the world and our industry.*
>
> *There has been a lot more secondary research available and we've been using it!*

Surviving 2020: Research industry trends and expert tips for moving forward with confidence

By Morgan Molnar
Director of Product Marketing, SurveyMonkey Market Research Solutions

2020 has been a challenging year. In order to succeed, organizations around the globe need to effectively adapt and it's never been more critical to make data-driven decisions. But that comes with a challenge: market research teams are getting more requests from stakeholders amidst falling budgets and scarce resources.

We decided to find out how organizations are using market research to navigate the changing marketplace. We spoke to 15 industry experts and conducted a survey of over 2,000 market research pros – both pre- and post-COVID-19 outbreak – and published our findings along with expert advice in SurveyMonkey's 2020 Market Research Survival Guide. Here's a sneak peek of what we heard.

- **More companies are benefiting from DIY research than ever before.** Respondents who reported that their companies had experienced financial growth in the past year have been moving toward DIY by boosting their in-house research over the past five

Biggest change

We asked respondents to tell us in an open-end about the biggest change their organization has made related to marketing research as a result of COVID-19. The change could be anything but most responses centered around the tools and techniques that were – or were not – being used as much as before. As you would expect, in-person research basically stopped altogether in favor of digital and/or online equivalents. No focus groups, one-on-ones or CLTs.

> *We shifted all of our focus on studies that revolve around the impact of COVID-19. We tried operating as "business as usual" the third week of March when everything was shutting down but it was impossible to ignore how it has fundamentally changed how we go about our daily lives and impacted shopping behavior.*
>
> *No in-person research is being conducted; otherwise we have continued with online surveys and online qualitative as before covid.*
>
> *Our biggest change has been the shift from traditional, in-person, multi-city focus groups to online qualitative in its many forms. We've used OBBs, online groups, online one-on-ones … anything that doesn't require travel or the face-to-face meeting of our consumers is fair game right now.*
>
> *Focus groups are now only online – interestingly, we are getting the same quality insights this way (cheaper and less travel for team members).*
>
> *Moved away from extensive in-person playtest and usability tests and gone completely online. We are only now dipping our toe back into the water to try some very small in-person playtests (with plexiglass dividers and all precautions: masks, temperature, health questionnaire, sanitizer, etc.).*

Some respondents said they expect things to return to normal, in terms of the tools and methods they use. Others say things will never be the same.

years, more so than those who reported their companies were on a financial decline (54% vs. 36%). Nearly 50% of market research professionals conduct more DIY research today than they did five years ago.

- **DIY survey tools help drive decisions but resources are still a challenge.** The vast majority of companies (87%) report using market research to inform at least some of their decisions but only 24% of respondents said they were able to meet all stakeholder demands given their current research budget.
- **People are looking for good data solutions as the COVID-19 pandemic continues to decimate marketing budgets.** Budgets are more than twice as likely to have decreased (42%) than increased (19%). To address the gaps this will create, respondents were over three times more likely to believe that their use of DIY tools will increase (41%) instead of decrease (13%). In contrast, respondents said their use of full-service vendors is more likely to decrease (54%) instead of increase (20%).

COVID-19 has accelerated an already emerging trend toward more in-house research. Our results confirm this clear trend toward do-it-yourself research. Seventy percent of respondents in our study predicted their company will likely transition to even more DIY tools in the next year. As this pandemic continues (especially as we enter the 2021 planning cycle), it's becoming more apparent that hiring expensive agencies to conduct market research is no longer a viable option for many. Enter DIY tools like SurveyMonkey, Fuel Cycle, UserTesting and others to the rescue.

To go beyond the data and learn how top companies are navigating and thriving in spite of the uncertainties we're all facing, check out our full report at surveymonkey.com/market-research/survival-guide/.

SurveyMonkey®

Totally scrapping in-person research. I'm not terribly sure in-person research will ever come back in the ways it previously existed. We haven't used any virtual qualitative platforms just yet but I imagine we will in the coming months.

We had planned to do lots of in-person qualitative immersion work this year. That, and all other in-person qualitative has either been delayed until sometime in 2020 or moved online. As a result, we gave back a huge chunk of our budget.

Pre-COVID we conducted 15-20 in-person focus groups. Now in the current state of the world, I feel we may never go back to those traditional groups.

The key phrase there is "in the current state of the world." Hopefully, once a vaccine is in place, even if we still have to wear masks more regularly, we will still conduct in-person qualitative – though of course, we don't know what the impacts will be of mask-wearing on being able to read a focus group participant's emotions! Several respondents offered variations on this take about in-person versus online research:

I hate not getting face time with consumers in real environments. Being able to stand with them and see how they interact with the environment in the store or look around the room to learn more about them and their personality when doing in-home interviews is sorely missed. Online qual can be good but it gives you tunnel vision to only what the consumer shows you. Lots of subtle cues are hidden.

Led to opportunities

For some, the COVID-driven changes have led to opportunities:

Marketing research has become even more strategic. We got invited to join a number of strategic initiatives since collecting VoC data via traditional *ways – like clients directly talking to customers – is limited now.*

Our use of virtual focus groups (online) has increased – we very rarely used it in the past. And we've been given license to test advertising creative, something that our brand team has always pushed back strongly against in the past.

Our biggest change has more to do with how we are reporting out insights. We are trying to stay ahead of the curve and push information out to the right team members as soon as we receive. This is to help exec teams make decisions based on these insights. This has been a huge undertaking for us but we've seen great engagement with what we are sharing.

My part of the company relies on IDIs with clients. We suspended all client research from lockdown until the beginning of July but have resumed. The only noticeable change so far is how many clients who weren't willing to do video calls now are totally comfortable with it.

Another oft-mentioned change was bringing more work in-house that used to be delegated to vendors, which has some staffs in danger of being overworked.

We have stopped outsourcing projects and brought them back in-house, which means a lot more work for my department for reduced pay. No relief in sight. Morale has tanked and we are not motivated to go above and beyond since we are not even thanked for our efforts.

Acknowledging the impact that the shift to in-house has had, there were also many expressions of empathy for vendors, who have been forced out of the equation.

We have lost some vendor partners who have gone out of business due to the pandemic. This has been so unfortunate and also caused us to scramble to try to find new vendors to complete projects we had in the pipeline.

We've had to delay (for a year) or cancel some projects that we were looking forward to, which not only creates uncertainty for us but can make our vendor relationships uncomfortable, as they are obviously hurting from this.

Best and worst

Next we asked twin questions to find out what have been the best and worst outcomes of COVID-19 on their jobs as insights pros. The best part about the worst part? The

From qual to quant: Leveraging quantitative insights during the stay-at-home economy

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

Beatrice Capestany
Research Consultant, quantilope

Johanna Azis
Head of Marketing – U.S., quantilope

Brands often use qualitative research to get at the "why" behind consumer behavior for a deeper understanding of customer needs, anchored associations towards brands and categories and in-depth reactions to new products or innovations. While face-to-face conversations with consumers can add a human touch to data points, they can also be increasingly difficult to attain. Getting your specific target group all in one place, gathering a substantial sample size and then conducting and analyzing the study is effortful from both a logistics and cost perspective.

Even more, COVID-19 and social distancing orders have introduced a new level of complexity to qualitative research as many consumers are forced to stay home. Today's researchers not only seek a more efficient solution to qualitative research but are now required to find a valid alternative for gathering qualitative insights as many traditional modes no longer exist.

In these cases, and in general, quantitative research can be used as a replacement for traditional qualitative approaches. Advanced quantitative research uses statistical modeling and analysis to transform respondent data into explanations or predictions of the "why" behind consumer behavior. By leveraging advanced, automated quantitative research methods researchers can quickly unlock deeper consumer attitudes typically associated with qualitative results.

Here, quantilope has developed a three-step, scalable process for researchers to implement advanced quantitative insights as an alternative to qualitative research. Steps 1 and 2 provide a framework to identify which quantitative method can be used to replace your qualitative question. Step 3 introduces how you can implement automated advanced quantitative research in an iterative framework for a complete view of your consumer or to support the development of a project from beginning to end. Iterative workflows provide the same deep insights at a fraction of the investment or length that multiple qualitative studies could take.

Step 1: Ask, what business question is your qualitative research trying to solve for?

Step 2: Ask, what is the goal of your qualitative research question?

Step 3: Create a series of iterative learning loops

For example:

Qualitative research question 1: Can we expand our business into a new product category?

Research goal: Understand what people associate with a certain category, what they associate with our brand and how this fits together.

The quantitative solution: Implicit testing using the single- and multi-association tests.

Data from qualitative IDIs or focus groups are used by brands when looking to create a new product outside of their category. However, leveraging automated implicit tests provides a more efficient approach to understanding why the product will or will not be successful.

Based on decades of neuroscience and psychology research, implicit tests capture the underlying unconscious attitudes of your consumers. Implicit tests can help you understand the signals a category, product or brand conveys to help you strengthen your own value proposition. Brands can leverage implicit tests to understand what consumers subconsciously associate with your brand and how those associations connect to the new product category you want to enter.

Implicit tests go beyond the insights that a qualitative approach can provide as they measure the unconscious forces that drive consumer decision-making – rather than a direct question-and-answer format. When automated, implicit tests can also offer a representative, reliable sample that's cost-efficient, providing insights in just days versus weeks or months.

To learn more, read quantilope's full whitepaper, From Qual to Quant, with additional examples and expanded sections on how to leverage automated advanced research methodologies in lieu of qualitative alternatives.

quantilope

Want to learn more? Visit www.quantilope.com/en-us/blog/from-qual-to-quant

large number of "n/a" or "nothing really" responses. Seems that some have been able to avoid being negatively impacted by the pandemic (or maybe they're just really positive people!). But this response summed up the feeling of many:

> *Uncertainty all around as an insights professional, employee, parent, husband and citizen of the United States. These are very trying times.*

As you might expect from a group whose job it is to think and talk about people and why they do what they do, the majority of the "worst" outcomes revolved around isolation, loneliness and a lack of connection to their colleagues and customers.

> *I'd say not being able to conduct in-person focus groups.*

> *No water cooler chats with other people to trade insights and updates.*
>
> *The "drive by" conversations don't happen. This can be good and bad.*
>
> *Loneliness, if you can call it that, of not seeing my fellow insights professionals and my energetic internal customers. No commute to ponder problem-solving. The distractions and challenges awaiting as soon as the*

workday has ended resulting from COVID-19 sometimes cannot be compartmentalized or go without addressing.

And, many mentions of the difficulties of working from home and having to navigate the needs of one's four-legged and underage office mates.

We have two young kids (5 and 7) and it's hard to work a full day and also be their teacher and entertain them during the day.

Also, the personal aspects of being a manager during an economic crisis.

Personally, I took a minor pay cut. Professionally, I had to furlough my entire team, which was incredibly difficult.

Verge of collapse

Many spoke of being asked to do more work with less budget and fewer staff. This, coupled with the often whipsaw nature of the research requests coming in (Focus on COVID and how it's affecting our consumers! Forget COVID! Tell us where we need to go from here!), has left respondents feeling on the verge of collapse.

Burnout risk – the intense sense of mission and urgency of collecting up-to-date data for our teams risks burning out my team, and the change in working conditions and lack of in-person connection makes it really hard for me to ensure everyone is doing ok and to provide the emotional support resources we would normally rely on.

Additional workload for reduced pay and no gratitude expressed, just more demands. I am burnt to a crisp.

Brutal, soul-crushing hours. Everyone else is bored at home and I'm working nights, weekends, non-stop to keep up with the research demands.

More essential than ever

So, what about the best outcomes? Many were mirror expressions of some of the worst aspects, lighter yangs to the dark yins. The pandemic has forced companies to focus on the importance of insights, several said, leaving them busier than ever but also feeling more essential than ever. Many extolled ing consumer insights, the role of market research is even more integral to business.

Workflow efficiency and information-sharing provide efficiencies

Platform-based consumer insights approaches enable teams to work together seamlessly, collaborate and build upon each other's knowledge base. Companies can share surveys and reports through the same platform to ensure quality, consistency and accessibility of insights.

Collaboration is crucial as research becomes cross-functional

The rise of market research's accessibility and perceived value has driven a corresponding uptick in company collaboration and a renewed interest in the role of research – and researchers. What's more, today's market researchers are leading global automation initiatives and understand that to ensure these initiatives are successful, they must be able to share best practices and collaborate with other stakeholders. Those stakeholders include other researchers and chief data officers, who fuse claimed data with behavioral data, customer experience data and survey data. This type of collaboration means better decision-making, marketing outcomes, customer service and monetization.

More access to data (and thinking) than ever

Market research has evolved into part of a richer, broader business story and strategy. From customer data to social media and other qualitative data, insights can tell a deeper story when coupled with additional information. As researchers, we're now working with new teams – within the marketing team to data scientists and more. Businesses extract more value from their research initiatives, intelligently power decision-making and identify new opportunities.

Quality and scalability provide opportunity

As platforms have evolved, they've empowered researchers to provide trusted resources to marketers, executives and other stakeholders to easily conduct and access high-quality research and instill confidence that their next business decisions are based on tangible data. With market research gatekeeping eliminated, more employees can access insights that drive real business outcomes, not merely validate preconceived opinions.

As market research continues to evolve, it represents a unique opportunity for research and researchers to play a pivotal role in the business and help accelerate change. Today's consumers are increasingly complex and only through data can we truly understand them and their requirements. With new easily accessible and real-time platform-based research offerings, researchers can collaborate across their organizations to help drive the customer engagement lifecycle, contribute to critical business transformation and ensure the most informed decision-making.

toluna

Want to learn more? Visit
www.gotostage.com/channel/q-report

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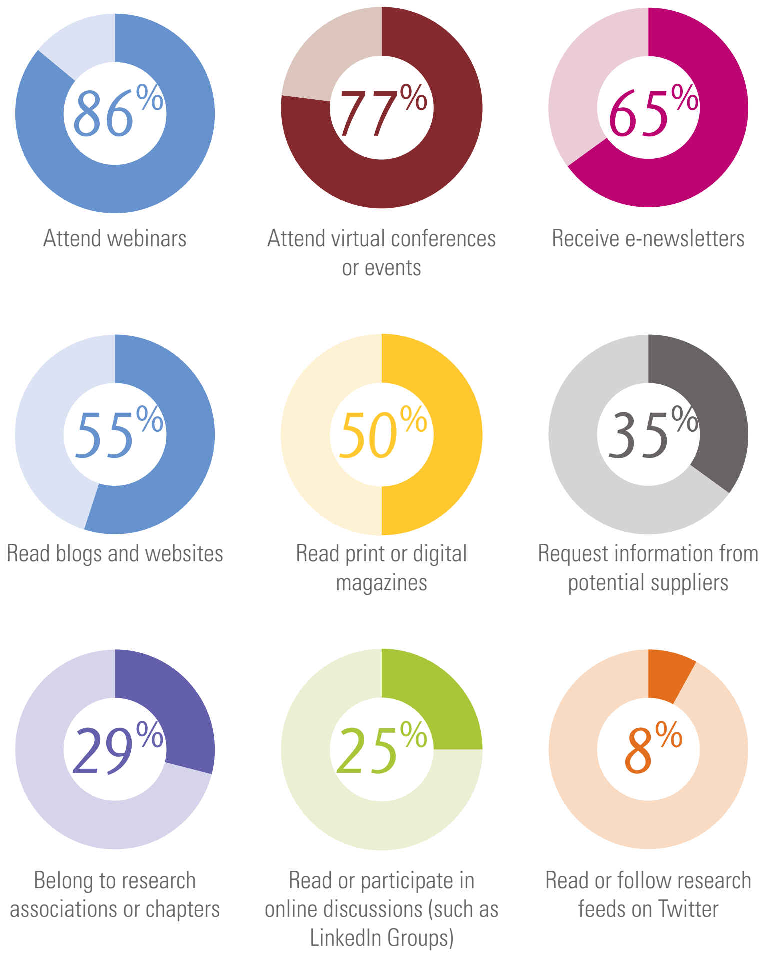
the benefits of being able to work from home full-time. Rather than missing commutes, they were happy to not have them and relished saving money on transportation and/or parking and eating workday meals out.

More broadly, those respondents who are also department managers were excited at the prospect of being able to draw from a geographically wider pool of job candidates, now that being physically located near corporate offices is no longer a must for potential applicants. Others reported pride in how their teams have shown their mettle during the crisis, responding to the increased workloads and demands for insight with aplomb.

A HUGE appetite for insights from executive leadership, whether voice of customer, market impacts or competitor movements.

The ways we are finding to innovate have been amazing. Sometimes "shaking things up" is a great way to learn, improve and advance our work.

Which of the following do you do to stay up-to-date on research methodologies and techniques? (select all that apply)



Our consumer research results have been elevated in importance to the highest levels of the organization.

My internal clients (stakeholders) have started to understand power of different methodologies (online discussion board, online IDIs, etc.).

We are delivering results that are used in Congress to make national-level decisions.

The potential to emerge in a different form through all this change.

Adapting to the new reality. Our company is spread out across the country and in some ways, we have had MORE contact with people in other locations, which has led to interesting new insights projects.

Many traditional methods of collection are off the table at this point, so we have had to be nimble and try new things. There has been an opportunity to innovate and use new technology that we probably wouldn't have previously. Knowing that everything is in flux, we have had to become comfortable with being nimble and coloring outside the lines when needed.

Several respondents reported a renewed interest from internal audiences/groups in turning to the insights function to help the organization get a handle on the pandemic and its impact on the world.

Gen Z needs real talk from brands

By Chloe Cheimets
VP of Research, Perksy

In times of social change, brands – and by extension the consumer researchers who advise them – are faced with a difficult set of choices. Speak out and risk overstepping your credibility or stop communicating and potentially alienate consumers with your silence. COVID-19 and the current movement for racial justice have renewed the urgency of these choices. Over the last five months, Perksy has been measuring sentiment around brand communication with a focus on the feelings of Gen Z, a generation notoriously difficult to reach on traditional platforms. Our research shows that Gen Z consumers not only expect brands to communicate more during these difficult times, but also to meaningfully contribute to the solving of social issues.

So, who are Gen Z, the generation emerging into adulthood in the midst of this enormous uncertainty? Born after 1996, they are, according to a Pew study published

→

in May, the most diverse generation in the United States, composed of only a thin majority (52%) of non-Hispanic white people. They are also poised to be the most educated generation, with 57% of current 18-21-year-olds enrolled in college. Crucially, Pew states that 70% of Gen Z believe that the government should do more to solve problems, the highest proportion of pro-government sentiment in any generation. In Perksy's research, we've found that among Gen Z, this desire for institutional intervention in social problems extends past the government to brands.

At the start of the pandemic, Gen Z felt least vulnerable to the effects of the disease. In late March, when cases had begun to rise, Perksy data showed that only 19% of Gen Z respondents were very worried about the effects of COVID-19, compared to 24% of Millennials, 37% of Gen X and 40% of Baby Boomers. Despite this skepticism, Gen Z were more likely than older generations to want communication from brands during this time. Fifty-six percent of Gen Z (compared to 46% of Millennials) wanted brands to communicate more during the pandemic. Gen Z also wanted brands to directly address the pandemic in their marketing materials. Forty-nine percent of Gen Z consumers wanted to see communications addressing COVID-19 compared to only 33% who wanted communications that did not.

As the pandemic progressed and the movement for racial justice grew, Gen Z consumers' lives changed drastically. They underwent personal and familial job loss, witnessed the scope of racial and economic inequality and found their educational futures disrupted. Our research shows that these experiences have changed them more than any other generation. Fifty-nine percent of Gen Z report being more aware now of racial injustice than before the pandemic (compared to 48% of Millennials) and 47% more aware of income inequality. A change in attitudes about brands has accompanied this shift in perspective. Gen Z consumers are more likely than any older generation to believe that the role of brands has changed since COVID-19. For example, 36% of Gen Z believe brands are creating community during this time, compared to 30% of Millennials and 19% of Gen X. Gen Z is also optimistic about the impact brands can have on injustice. Sixty-eight percent of Gen Z consumers believe brands can make real change regarding racial inequality.

In the future, attracting and maintaining Gen Z consumers will require regular communication about pressing issues and a dedication to making the world a better place. As time passes and the Gen Z generation becomes an increasingly powerful share of the economy, successful brands must adapt to the role this generation expects them to play in their lives.

To learn more, visit www.getperksy.com.

perksy

Suddenly everyone relies on insights even more – and we became the go-to source of understanding what is happening to our business. This was always true but many didn't realize it and paid more attention to sales than consumer behavior holistically. Now they really understand that other behaviors are more forward-looking indicators of what will happen to sales.

There were also multiple mentions of other unexpected side benefits to the pandemic in answers to the various open-ends, including higher response rates (especially among B2B respondents, who perhaps have more time on their hands or are stuck in their home offices) or improved uptake and effectiveness of certain digital tools, especially those involving video – likely as an offshoot of all of us being forced to live on Zoom calls to see our co-workers and family members.

"We are rising to this unprecedented occasion…"

51% of respondents are moderately or extremely positive about their future in market research

> *Before COVID, getting traction on behavior change around research tech tools was slow. Now there is wide acceptance and fast adoption – because we don't have a choice. Like most things in nature, in order to change direction, we must hit a wall first!*

While many readers said they were busier than ever, several respondents reported having more time for professional growth during the pandemic, whether it was in the form of learning about their company and its industry or exploring new research-related topics or techniques. We asked respondents how they stayed current at a time when in-person events aren't possible. Attending webinars was the most popular way to stay up-to-date on research methods, followed by attending virtual conferences or events, reading e-newsletters, blogs/websites and print or digital magazines.

How do you feel about your profession?

While we gleaned many viewpoints on the topic from answers to other questions, we felt it was worth a more direct ask to find out how readers feel about their jobs as insights professionals. On a scale from extremely negative to extremely positive, "moderately positive" came in at 33%, with 18% extremely positive. Fifteen percent were smack in the middle, neither positive nor negative. Slightly negative clocked in at 10% and just 4 percent were moderately negative and 1 percent extremely negative.

The open-end responses to this question echoed many of those detailed above. Just as there were multiple expressions of optimism about the role and status of research, so too were there an equal number of gloomier takes. In the main, it seems to come down to how valued the insights function is by those in upper management. If an organization puts a real emphasis on listening to and hearing from customers, the insights function naturally has a chance to thrive. But if MR's status is iffy to begin with, some respondents have said COVID-19 has been a convenient excuse to slash budgets and headcounts. As always, researchers seem aware of and realistic about how the business world works.

> *There are many things that excite me about the profession but I worry that we are perceived as, or hold on too strongly, to traditional approaches. In order to remain relevant, we need to adapt (or die).*

How to prioritize innovation

By Wale Omiyale
Global SVP Business Development
Confirmit

2020 has not run according to plan. For research businesses, some of whom were already struggling with the challenges of commoditization and DIY tools, it's been the straw that broke the camel's back. For others, though, it's been an exercise in agility. An unprecedented push in making changes that were already under consideration. In short, it's been a survival mission.

Like most survival missions, it's about prioritizing what matters, getting the balance right and not getting distracted.

For research businesses, a critical balance is between being smart and being clever. No, they are not necessarily the same. We all love to play with clever new bits of kit – the shiny new tools that we've not been able to use before and which are fun and different. The thing is, at the moment, we've got to prioritize the things that add value.

> *With budgets being cut, it makes it harder to do quality research that will lead to a ROI. I worry that there is also too much demand and not enough of me (I am solo), which tends to never end well.*

Truly remarkable

Taken as a whole, given the unprecedented nature of the times we are living in, the prevailing feeling of hope that our readers

Yes, it's shiny and new. But do your clients want or need it?

Remember a couple of years ago when so many got very hot under-the-collar at the idea of using Google Glass and VR for gamified data collection? Pretty sexy. But uptake was minimal. The tech was too unwieldy, delivered an uncomfortable experience for the respondent and the insights were not necessarily "value adding." Clever, but not smart. Now is not the time for that.

I don't mean to be negative. There is absolutely a case for innovation in research, it just needs to be the right innovation. There are plenty of possibilities out there. What are the questions you need to ask to help you decide?

1. **Who is my audience?** Seems basic, but it's vital. Age groups, demographics and location all have an impact on how people communicate with the world. Is now the time to break out an Alexa survey? Fifty percent of all age groups use voice technology now, so maybe it is.
2. **Will technology add value?** Think about whether you're deploying technology because it will deliver efficiencies or if you want that shiny toy out in the world. Does it save money? Time? Will it boost response rates or improve the quality of insight, or not?
3. **What is the actual benefit?** What do you actually need to achieve? With budgets being cut, deliver what your client needs, rather than trying to wow them with something new. Will text or social analytics, for example, get you to where you need to be more quickly and efficiently?

In getting this balance right, think about how to streamline your delivery, too. As insights professionals, we rely on data visualization to help us deliver insights. But often, the people you're delivering to need a helping hand to interpret data. Of course, there are times when you set up workshops and meetings to share insight and drill down into the implications. But at the moment, speed and simplicity are of the essence, so look at how you can use technology to reduce your resource load and meet the client's needs. Automation is our friend.

The great advantage of data visualization is not just that it helps everyone understand data, but the speed at which we can now deliver through automation is greatly enhanced. Faster delivery results in more time for delivering the research story to a client – which means the opportunity to drive business value. Speed is also important on the competitive playing field – it can present a true advantage to be equipped to make an informed follow-up faster than your competitors.

As you face the remainder of what will continue to be an uncertain year, it's time to be ruthlessly pragmatic. Embrace the tools that will make you more efficient, more competitive and better able to serve your customers. Think of it as back to basics, with an innovative flair.

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expressed throughout their responses to our survey is truly remarkable. They acknowledge their good fortune – they have jobs at a time when so many do not – while also realizing the weight of the responsibility being placed on their shoulders. But perhaps the most laudable thing is, they, for the most part, seem to welcome the challenge and are prepared to help their organizations make a path forward.

I believe this will be the defining moment of my career and feel incredibly proud of my team of researchers for the work they are doing. We are rising to this unprecedented occasion and doing intensive, impactful work to amplify the voices of people living through an incredibly hard time. Every day I see my company use our insights to better inform and support people around the world who are struggling through the pandemic. There's never been a time I was more thankful for my training and experience.

LEANING INTO DISRUPTION

Under increased pressure, and reduced budgets, client-side researchers rise to the challenge

By Emily C. Koenig, Digital Editor >> Quirk's Media

snapshot

Quirk's Editor Emily C. Koenig shares how several client-side researchers are adapting to the changes brought on by the COVID-19 pandemic, while also touching on their hopes for the future.

This year, the marketing research and insight industry is working overtime to face the challenges brought on by the COVID-19 pandemic, redefining insights and identifying the skills necessary to survive. Individuals and teams around the world are managing drastically shifting budgets and new work environments due to an ever-evolving new normal. In light of these challenges, I decided to reach out to a few client-siders to see how they – and their teams – are handling the changes brought on by COVID-19.

While each researcher I connected with was impacted in different ways, one thing stood out: from working under added pressure, to managing reduced budgets and finding new ways to understand the customer, researchers have taken on the challenge of adapting in the midst of crisis. As Jennifer Golson, consumer insights, Universal Parks & Resorts, put it, "A crisis like this forces us to reflect and question the way we have done things in the past and to take opportunities to improve and change."

Getting to the heart of why: Consumer change in a disrupted world

By Dave Lundahl
CEO, InsightsNow

It's easy to follow what consumers have been doing but difficult to predict what they will do. A classic approach to predicting behavior is to attribute behavioral change to a shift in need states. However, in a world disrupted by COVID-19, this Maslovian needs state model is too simplistic. It does not sufficiently predict behavior for marketers and innovators to plan their response in the face of market disruption.

For the past four years, we have been tracking a segment of consumers called Clean Label Enthusiasts®. This group increased during that time from 12% to 34% of all U.S. primary household shoppers. In addition to their clean-label buying behaviors, a unique characteristic of this segment is a higher than typical distrust for large corporations as well as government institutions who set regulations for how products are manufactured, advertised and labeled. They are the consumers behind the growth of the natural products industry, which promotes products with ingredients that are organic, natural and sustainable. Our question going into COVID-19 was whether this segment's motivators would change and whether these shoppers might seek different price-value trade-offs.

The answer is becoming clear. The COVID-19 disruption has accelerated rather than inhibited global demand for natural and natural-positioned products. Why? Because the media broadcasting through various channels about COVID-19 continually reinforces the basic tenet that large corporations and government institutions cannot be trusted.

Before the COVID-19 pandemic, 53% of Clean Label Enthusiasts distrusted the U.S. food system. Recently, the U.S. FDA issued a temporary guidance to help food manufacturers more easily make "like" ingredient changes without a label change in order to quickly address supply chain challenges. This regulatory change – while welcome by food manufacturers – is further eroding trust among consumers already on high alert about health and safety concerns. The short-term economic gains for food brand owners may not be worth the long-term consequences. These ongoing changes to regulations continue to disrupt consumers and make it difficult to use Maslovian needs states to predict behavior changes. A stronger, more predictive approach emerged when we applied a behavioral framework called the Emotions Insights Wheel™.

Using this framework, we projected back in March what we believed would be short- and long-term consumer behavioral changes due to COVID-19 and we have been tracking Clean Label Enthusiasts' behaviors and motivators since then. This model predicted an initial rise in functional motivators for purchases of consumer packaged goods to address health and safety fears. We saw this play out in the hoarding of toilet paper and clearing of retail shelves of disinfectants.

We are now seeing a rise in predicted psychological motivators where people are seeking products to help them feel better and change their moods. We are also seeing a rise in sensorial motivators that drive purchases of products to re-experience what has been recently lost due to the restrictions of the pandemic. Further, we are seeing family time emerge as a key social moment motivating product purchases. Predicting motivators has been helpful to marketers and innovators seeking to stock store shelves with the products consumers currently seek.

Today, more than ever before, marketing researchers are needed to get to the heart of "why." To help our internal or external customers plan for the future, we must go beyond the Maslovian needs state model and embrace behavioral science. If you wish to learn more about our predictions and recommendations for your brand or product, check out our COVID-19 Tracker of Clean Label Enthusiasts®.

InsightsNow

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> "A crisis like this forces us to reflect and question the way we have done things in the past and to take opportunities to improve and change."

It's important to note that this article is not an attempt to provide a definitive take on the effects of COVID-19 on end-client researchers. Instead, it is my hope to spark important conversations about growth, resiliency and change within the industry.

Adapting to change

Several researchers spoke to the challenges faced due to changes in their day-to-day collaboration habits. This is not unique to researchers, but something employees around the world faced when suddenly jumping into work-from-home life, many for the first time. When listening to client-siders, it quickly becomes obvious that the challenges brought on by the sudden shift to virtual working environments is more than just a social one. While tools like Microsoft Teams or Zoom assist in maintaining vital communication lines, adapting to new solutions takes time and (continued) effort.

"PBS did not have a big work-from-home culture before the pandemic began so it was a big shock to send everyone home so quickly in March," says Eliza Jacobs, director, consumer insights and analysis, PBS. "Over these past few months, what I have come to truly miss is the convenience of dropping by a coworker's office or cubicle to ask a quick question or have a chat."

Jacobs went on to describe what she calls "video meeting fatigue" – something introverts in particular may be struggling with – sharing tips that have helped her manage, if not completely overcome, it.

"We have talked about blocking our calendars on a particular day in order to get work done, and I engage in what a friend of mine calls 'defensive calendaring' – preemptively blocking my own calendar to give myself space that I need."

With nearly all interactions being planned out in advance, and spontaneous conversations nearly impossible to achieve due to the shift away from a traditional office setting, Julie Levine, senior consumer insights manager, Cuisinart, reflects on how the COVID-19 pandemic highlights the importance of unstructured conversation to problem-solving.

"The most challenging aspect for me is communicating with my internal clients. Pre-pandemic, I would often stop by in person to ask a quick question. Some of my most productive encounters were spontaneous run-ins in the hallway, kitchen or even the bathroom," says Levine. "Now, working from home, communication is planned and deliberate. I find that people have their own personal styles and you need to be open to all methods."

Stephanie Heller, consumer insights, Universal Parks & Resorts, shares how her team has taken on communication and collaboration challenges brought on by virtual work, improving their internal partnerships from a project development perspective. "One thing we are all doing more is working in pairs or small teams on projects that may have been run by a single individual contributor in the past," says Heller. "We still have project leads, but this new collaboration is driving best practice dissemination, training and also just helping people feel more connected."

Using 'basic' research to guide us to a brighter future

By Jerry Thomas
President and CEO, Decision Analyst

The emergence of COVID-19 is not surprising. Given the growing pandemic risks driven by world population growth, greater urbanization and faster transportation systems, the probabilities are high that we will see many more pandemics over the next 100 years. What is most unique about COVID-19 is its devastating economic impact. Presently, preventing the virus from overwhelming health care systems requires shutting down roughly one-third of all economic activity. COVID-19 will bring about a deep worldwide recession in 2020 and probably cost the world economy something on the order of $20-$25 trillion. The COVID-19 pandemic, its high death toll, its disruption of social life and its destruction of the economy will be seared into our collective human memories for a long time to come.

Consumer attitudes and perceptions will be changed forever. Industries, companies and brands will be forced back to the drawing board to relearn and re-understand their consumers, markets and distribution systems. Companies will have to reinvent, reposition and rejuvenate their products, services, marketing and advertising. No one knows exactly how attitudes and perceptions will mutate and evolve but any company or brand that fails to reinvest in basic marketing research to understand and stay in touch with their markets and customers is at peril of oblivion.

In-depth qualitative research is one technique of great value (conducted online, for now, due to COVID-19, but eventually we will get back to in-person). Not only can qualitative research help us understand the deeper psychological and emotional impact of COVID-19, but it can help us look into the future and make intelligent decisions about the likely range of consumer attitudinal and behavioral responses. Once we know what's likely to change and the range of those changes, then we can bring quantitative research methods to the fore. Choice modeling is a powerful quantitative technique that measures and predicts how consumers will change and imputes the strategy implications of those changes. Choice models allow us to create different scenarios of the future and measure how consumers will choose among those scenarios.

One other basic research technique is worthy of mention. Twenty years ago, most brands had some type of awareness and attitudinal tracking studies in place to monitor the effects of advertising and media initiatives. During the Great Recession, 2007-2009, many of those large, expensive tracking studies were permanently cancelled, on the very eve of the greatest changes in media in the last 50 years. Many companies and brands tried to navigate the post-recession years without any understanding of the changing advertising and media landscape and some of those businesses are no longer with us. Brands with good tracking studies in place sit in the catbird seat. They can analyze the pre-coronavirus world and compare it to attitudes and behaviors post-coronavirus. This pre-post research design yields valuable information, especially during periods of rapid change or disruption.

All of these suggestions fall into the category of "basic" research – and there are many other types of research to consider. Now is the time to increase research budgets and rededicate ourselves to the pursuit of knowledge and truth – and a brighter future.

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Decision-making

Finding ways to connect with and understand consumers during a global pandemic has been a challenge for many brands. And as Lisa Saxon Reed, director, global sensory, Mars Wrigley, says, it has left many client-side leaders asking, "How do we make sure the consumer is at the heart of our decision-making when we can't connect in the usual ways?"

"Pre-COVID we were experimenting with virtual and AI techniques to help us stay close to our consumers," says Reed. "COVID-19 has given us an opportunity to accelerate this work, learn what does and does not work, and how to do it 'right' on a larger scale. Accelerating this new way of working presented significant logistical challenges, especially with product experience research outside of our hometown or our home country."

Bernard Brenner, senior director research, CMR, Microsoft, expressed a similar sentiment. "COVID-19 tested the agility and creativity of our research managers. Nearly overnight, research managers got pressure on business questions, methodologies and budget," says Brenner. "We were asked to investigate environmental impacts on our customers as they were rapidly evolving in the market. We had to pull out of qualitative research as facilities shut down. We had to cancel or reduce sample sizes on quantitative projects that were scoped to address key strategies."

While many may be daunted by this need to quickly pivot – specifically in a time when concrete answers are hard to come by – insights teams around the world are proving they are up for the challenge. Brenner went on to share how the need for rapid response and quick answers helped his team grow.

"They quickly adopted more diverse data sets, such as organic social data to understand business issues in real time," he says. "They experimented with telemetry data sets to get signals on how usage was actually happening. And they onboarded new qualitative techniques, often doing interviews themselves ... I think a benefit from COVID-19, which sounds weird, is that our researchers are more adaptable, creative, resilient and faster. And these qualities will only serve our business better as we move forward to a new normal."

But even when insights teams are able to adapt, act quickly and connect with consumers, the uncertainty surrounding COVID-19 can be overwhelming. For some industries, such as travel and leisure, using research to inform long-term decision-making is the greatest challenge.

"A major challenge is balancing the unavoidable impact that COVID is having on current consumer mind-set to travel with the need to do research to inform organizational decision-making in the both the near- and the long-term," says Golson, Universal Parks & Resorts. "Our insights projects are very forward-looking, and while it is clear that this pandemic is going to have long-lasting social and cultural impacts, we all hope for and expect a recovery at some point, and a lot of our work will inform decisions that will come to fruition years from now. Balancing those needs with the present extreme salience of COVID on the consumer psyche is difficult."

"How do we make sure the consumer is at the heart of our decision-making when we can't connect in the usual ways?"

Hope for research and insights

While there is no doubt that brands are facing an uncertain road ahead, the individuals I interviewed hold so much hope for research and insights. And they aren't waiting around for business as usual to return before getting to work.

One area where this is most obvious is the more widespread adoption and use of virtual research techniques. COVID-19 is pushing researchers – and brands – beyond their comfort level in terms of methodology and technology choices.

"Our biggest challenge has been: How do we make sure the consumer is at the heart of our decision-making when we can't connect with our consumer in the usual ways? 'Virtual done right' can work in many markets around the world," says Reed. "Does that mean we will be 100% virtual when the COVID storm passes? No. Will it be a much larger percentage than it would have been? Definitely, yes."

Golson pointed to similar work being done within her team. "Rather than waiting for a return of a normal that may never come," says Golson, "we are taking on these challenges as opportunities to adjust and even wholly transform some of our most bedrock research programs."

Bessam Mustafa, director, fan insights, Toronto Blue Jays Baseball Club, also believes it is important to continue on – in his case, this means surveying fans and soliciting feedback with respect to the pandemic itself and how fandom is manifesting during these unprecedented times.

"To date, the response has been positive. In some cases, we're seeing higher response rates and quality of data. We were some of the earlier movers when it came to asking customers honest questions about how they perceive the pandemic," says Mustafa. "We can't disappear now and expect people to participate with us again in three, six or 12+ months when it's convenient for us – I'd rather keep the trains rolling."

Several researchers also expressed hope that some of the new perspectives and behaviors originally sparked by this unprecedented time will stay with the industry long after it has regained stability.

"Our industry is incredibly resilient," says Jacobs. "Obviously this has been an incredibly turbulent few months, but what I am most heartened by is how many honest and, at times, painful conversations are now being facilitated by insights professionals. The insights are deeper and more meaningful."

At the end of the day, it may be this resilience that allows researchers to rise to the challenge, step back, gain perspective and ask the tough questions to best serve consumers and brands during these uncertain times.

WHERE DO WE GO FROM HERE?

Advice for researchers on surviving the impacts of COVID-19

By Christina Nathanson

Let's face it: 2020 has been a year for the record books. We all thought 2020 was supposed to be about a clear vision but what did it actually prove to be? To me, it's felt a little like getting stuck halfway through putting on a sports bra after not thoroughly drying off from a shower. I'm just waiting for someone to help cut me out of this thing!

We've had our fair share of Zoom meetings, Netflix bingeing and social distancing. There were no graduations or proms. Parents became teachers and teachers became technology experts. You may have lost your job, been furloughed or saw unusual gaps in your calendar because research plans and budgets were frozen and your company's sales declined significantly.

As researchers, we need to stick together even through losses, insecurities and setbacks. Events like this can rock us to the core and strip away our assumptions. They push you to reconsider what is most important.

My goal with this article is to leave you with a new way of thinking, no matter where you are in your career life stage.

There's a great quote by my late uncle Hank Virgona, a New York artist: "The things you see out of the corners of your eyes are the things that are most important." He pointed out that as an individual, there are so many instances where we just go about our day-to-day, missing out on the little bits and pieces around us, the lighting, the shadows, the way something – someone, a new idea, a competitor – is sitting there, right next to us and we just missed it. Countless episodes of our lives are lost because of the numerous distractions and diversions that take place.

Why do I mention Hank? He was no marketing guy but for all intents and purposes, he was right!

This leads to the first tenet: Be powerful – find your why.

Uncle Hank played a significant role in who I am today. He was a New York City artist, rode the subway to and from his home in Queens, N.Y., to his art studio in Union Square until he was 89. He observed everyday people on his daily commute, his "models," in their natural habitats. Life was simple and art became his muse. In just a few strokes, behind a newspaper, sketchbook and pencil in hand, he captured and preserved people and objects around him. He illustrated sorrow, happiness, anger and stillness almost every day until he could not commute anymore.

In December 2018, his art posse organized a one-man show called The Full Virgona. This two-week event rejuvenated him in his why – his love for art and for people. On opening night, he sold 45 paintings; he had not sold that much in over five years. This turning point in his art career gave him the momentum to continue making art until the end of his life, just five-and-a-half months later. His rediscovery of his why late in life prompted our two worlds to collide as he passed his legacy and art responsibilities to me as executor. (For more about his life and his art, check out the documentary "Nothing Changes: Art for Hank's Sake" by my nephew Matthew Kaplowitz. It's free if you are an Amazon Prime member!)

Since I was unemployed, I took the time to personify Hank and elevate him to the level he deserved. He always said to me, "The difference between Picasso and me was that Picasso had a better agent." Well, Hank, I hope to make you even more famous as I undertake the role of art consultant and curate your works. While I'm not artistic, I am a marketer. I understand Hank and can become his persona. I love hosting virtual gallery showings on Zoom as it's given me exposure to a whole new network of creative people and lets me tell stories about him through his art.

A blog post from Scarlett Erin, a writer and counselor from Assignment Star in the U.K., entitled "Your why matters: the 10 benefits of knowing your purpose in life," has served as a compass for me. As she explains in her post, knowing your why:

- **Helps you stay focused.** When you know your life's purpose, it becomes easier to focus on what matters the most in your life. Uncle Hank focused on his art and the objects and people around him, revisiting his why every day. Focus has grounded me in my darkest days.
- **Makes you feel passionate about your goal.** Knowing your why helps you find your true passion and this feeling becomes an essential driver for achieving something extraordinary. While Hank didn't sell a lot of art, he knew that there was a meaning behind it. His passion pushed him to reach his goal of painting every single day.
- **Gives your life clarity.** People who know their why in life are unstoppable. You have a goal, you won't waste your time on sweating the small stuff. Hank knew his purpose; he also didn't sugarcoat it either.
- **Makes you feel gratified.** When you feel gratitude, you express it regularly and base your decisions, thoughts, feelings and actions around that overarching purpose. Hank saw good in others, thus making a more significant impact through his work, which encourages a sense of gratification. He was also thankful that he could still do his art every day.
- **Makes life even more fun.** When you know your purpose, you enjoy every minute of it. There is so much pleasure in living a powerful, purpose-driven life and better tackling every situation in a creative way. Even the dullest thing becomes beautiful and artistic. You become one with others.

This points us to the second tenet: Stay resilient – shift your mind-set.

You're probably tired of hearing the word resilient as it's been used in so many advertisements over the past several months. But resilience is important because it allows us to develop a positive means to protect against experiences that could be upsetting. It also serves as a way to maintain equilibrium in our lives, especially during stressful times like COVID-19. However, resilience doesn't just come overnight.

I have some advice on how I've stayed resilient and shifted my mind-set.

Data visualization is everything to me! Seeing an aspect of my life in a visual way added so much more meaning to what I was trying to accomplish. During quarantine, I committed to exercising at least 30 minutes of activity, sometimes more, every day. It was difficult to make this commitment when Netflix and the couch were so close to where I worked out in our house. But as I looked back at my activity

log on my Apple Watch since the quarantine, I was shocked!

To keep the exercise habit alive, I started free Orangetheory virtual workouts with a friend who kept me accountable and I posted daily updates to my Instagram story. Sometimes we did them on Zoom together. Other times we used our apps to log in. Not only did we get fit but we also had followers who reacted to our story, catching the attention of the local fitness studio. We built up our own community and tribe. Further, I'm extremely proud of this because I am physically stronger and have a stronger immune system.

Mental health is also critical. According to the American Psychological Association, mindfulness meditation can improve both mental and physical health. Self-talk and meditation will enhance resilience – just five minutes a day can keep you sane. Meditation helps people stress less, focus more and, most of all, sleep! Headspace is an app that makes meditation really easy, teaching you life-changing mindfulness skills in just a few minutes a day.

Another way to stay balanced and improve resilience is through journaling as it allows you to talk to yourself without judgment. If you find it difficult to start writing, you can try a guided journal. I purchased "One Question a Day: A Five-Year Journal" for each member of my family for the holidays last year. It offers one random question per day to be answered on the same day for five years in a row. The questions range from prosaic, "What did you have for lunch today?" to the contemplative, "Can people really change?" On other days, I have literally written, "WTH is this world coming to?" or "I don't know how I managed to survive that (whatever)."

BE POWERFUL

Revisit your "why"

FOCUS • PASSION • CLARITY • GRATITUDE • FUN

STAY RESILIENT

Shift the mind-set

PEOPLE • SELF-TALK • MIND & BODY • CONNECT • OPTIMISTIC

BE FULFILLED

Try something new

RESOURCEFUL • EXPLOIT • NETWORK

Finding a creative outlet to be optimistic about and having some feel-good vibes around the neighborhood made for more positivity. For example, we painted rocks and left them in front of a neighbor's tree or in a rock garden to show our gratitude. I also hosted a virtual wine glass painting night with six friends on Zoom, where we spent an hour or two sipping wine, chatting, painting and observing the beauty in our creativity. (I think the wine may have helped.)

To recap, how can we stay resilient?

Shift the mind-set. The saying "birds of a feather flock together" is true. Surround yourself with like-minded people who match your desired mind-set. They don't have to be in your career – my Orangetheory Fitness community became my tribe. You will feel better about yourself and will have a stronger foundation for your roots.

Keep up the positive self-talk. Honestly, if you tell yourself that life sucks and that it's going to be awful, it probably will be. Saying "I can do this" instead of "I can't" works. For me, those Orangetheory classes were tough. I said to myself, "I can do anything for 30-60 seconds at a time." And remember, modify if you have to. Posting on my Instagram story every day started a tribal following and made me accountable and helped me change my language from "I can't" to "I can."

Take care of your mind as well as your body. Some days, you need to be alone. If the only free time or place you have is either in the shower or on the toilet, take advantage of those moments. Close your eyes. Meditate with Headspace and breathe. Other times, you need to work out – it could be a long walk or a 30-minute video. If your mind and body are strong, you will become stronger.

Sometimes you can't go it alone, which means connections are important. Sift through your LinkedIn list and find successful colleagues from your past and message them. "Hey, it's been a while. I really miss how we used to sit in your office after a long meeting and chat. Do you have some time next week to connect via phone or Zoom?" You don't have to have a particular ask but you never know what will come out of it. Just updating each other on your lives may create a new venture for both of you.

Lastly, be optimistic. An easy way to do this is to write down one thing every day that brings you joy and put it in a jar. When you are feeling down, pick a note out of the joy jar. For me, it was my Instagram posts or sharing the rocks that I painted with others. By the end of the week, there will be many things to share with a group of friends who can share their moments of joy too. And all of this can be very healing.

Artist Hank Virgona at work in his studio.

And now we've reached tenet three: Be fulfilled – try something new.

Shark Tank entrepreneur and Dallas Mavericks basketball team owner Mark Cuban has been a driving force to support small businesses during the coronavirus crisis. His advice for those out of work during COVID-19: collect unemployment; don't stop applying for jobs; and most important, make use of whatever downtime you have to brush up on the skills that might impress your future employer. As he has said, "The first question every interviewer is going to ask you is: What did you learn during the pandemic of 2020? What skills did you add?"

Not sure where to begin? I'll share a few tips to get you started.

One thing that has saved me is **LinkedIn Learning**. It's an online educational platform that helps you explore business, technology-related and creative skills through expert-led course videos. The learning I have undertaken has paid off in spades, including courses on writing articles and blogs, SEO and Google Analytics, how to use HubSpot and WordPress and also the basics of blockchain. And you can post the certificates on your LinkedIn profile, adding to your toolbox of new skills.

Salesforce is great if you are in sales and find yourself with more downtime than you prefer. Even if you don't use Salesforce in your business, you will pick up tips and tricks along the way.

Research Rockstar delivers specific research training as well as offering freelance opportunities if you're looking. Its president, Kathryn Korostoff, is an amazing instructor, too. I took a behavioral economics class with her in May and learned more than I even bargained for.

Through the end of 2020, Class Central reports that **Coursera** is offering free certificates for 115 courses, ranging from personal branding to marketing analytics. Another online tool is **eLearning Industry**, with both paid and free courses, webinars and seminars.

I can't go any further without mentioning the importance of networking. Aside from LinkedIn, I have stumbled across a few great resources to find like-minded people. **Fairygodboss** is all about improving the workplace for women by celebrating, supporting and connecting them. Its co-founders, Georgene Huang and Romy Newman, are committed to providing a free digital platform for millions of women to access anonymous job reviews, community advice and jobs at top-rated companies for women. You can chat with other career go-getters and connect on advice across the spectrum anonymously if you wish. If you are an independent consultant, **EM Marketing** is a great resource. Not only is it a marketing consulting company but it also facilitates an independent consulting forum with a Slack channel as well. We have lively Zoom discussions and share ideas and resources with the consultant community. The last one is **Sweathead**, a private Facebook group to help people who think for a living practice how they think. They encourage participation on their Facebook page and post questions, ideas, frameworks, videos and articles that will help people approach their work in better ways. Hosted by Mark Pollard, it's a really different way of learning.

To be fulfilled, it's important to spice it up and bit and try something new every once in a while.

- **Be resourceful.** As Mark Cuban mentioned, make use of whatever downtime you have to brush up on skills that could impress your future employer. Carve out 30 minutes a day for online classes. If you are working, look at your company's website for specific management development training. If you have a lull in sales, start a Salesforce module even if you don't use it. Also, there are opportunities to get certified and pass an exam given by a certifying body which you can leverage when job-hunting or asking for a promotion. Depending on your industry, there are multiple certification options, programs and organizations to choose from.
- **Exploit the heck out of the free or low-cost educational courses that you can take.** You'll gain solid experience and some will also offer a certificate to prove you took that course. In addition to free training, try something new. There are webinars available to learn more about a specific topic in a short period of time, usually 30-60 minutes. Even better, they're guided by someone, often in real-time, so you can ask questions and enjoy that classroom feel.
- **And don't forget to network.** At the recent Quirk's Virtual Event, I connected with 20 new people the day I presented the session this article is based on. I loved it! Every new person you connect with brings the potential for a new adventure. As the kids used to say, "YOLO!"

Based in Stamford, Conn., Christina Nathanson is a seasoned insights strategist. She can be reached at christina.nathanson@gmail.com.

CALENDAR OF EVENTS

••• can't-miss activities

The 2020 Pharma CI USA Virtual Conference and Exhibition will be held online **September 30 - October 1**. Visit usa.pharmaciconference.com.

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

Informa Connect will host TMRE: The Market Research Event as a virtual conference **October 5-7**. Visit informaconnect.com/tmre.

Worldwide Business Research will hold its eTail Boston 2020 event on **October 13-15** at The Sheraton in **Boston**. Visit bit.ly/2YHLAco.

The Bay Area Virtual Pharma Market Research Conference will be held online **October 14-15**. Visit bay-area.pharmamarketresearchconference.com.

Empresarial will hold its 2020 Printemps Des Etudes (Spring Studies) Trade Show on **October 22-23** at Palais Brongniart in **Paris**. Visit printemps-etudes.com.

Informa Connect will hold its UX Research and Insights Summit as a virtual conference **October 26-28**. Visit informaconnect.com/ux-research-insights-summit.

The Quirk's Event Virtual, Fall: New World, New Tools, will be held online **October 27-28**. Visit www.thequirksevent.com.

ESOMAR will hold its APAC Insights Festival online **November 1-3**. Visit bit.ly/2YEt8RO.

The European Pharma Market Research Conference will be held **November 3-4** in **Opfikon, Switzerland**. Visit europe.pharmamarketresearchconference.com.

The 2020 Pharma CI Europe Conference and Exhibition will be help on **November 5-6** in **Opfikon, Switzerland**. Visit europe.pharmaciconference.com.

Informa Connect will hold its Insights Leadership and Talent Summit as a virtual conference **November 9-10**. Visit informaconnect.com/consumer-insights.

The **Merlien Institute** will hold its MRMW APAC 2020 event as a virtual conference on **November 17-18**. Visit apac.mrmw.net.

The **Merlien Institute** will hold its MRMW EU event on **December 1-2** in **Amsterdam**. Visit eu.mrmw.net.

Informa Connect will hold its FEI event online **December 8-10**. Visit informaconnect.com/feiusa.

The Pharma Market Research Conference USA will be held on **February 3-4** in **Newark, N.J.** Visit usa.pharmamarketresearchconference.com.

The 2021 Quirk's Event – Chicago will be held on **June 2-3** at the Hyatt Chicago in **Chicago**. Visit www.thequirksevent.com.

The 2021 Quirk's Event – London will be held on **July 20-21** at the InterContinental London 02 in **London**. Visit www.thequirksevent.com.

The 2021 Quirk's Event – New York will be held on **August 17-18** at the Javits Center in **New York**. Visit www.thequirksevent.com.

Event details as of August 17, 2020. Please see websites for more details.

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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Quirk's Marketing Research Review, (ISSN 08937451) is published monthly by Quirk Enterprises Inc., 4662 Slater Road, Eagan, MN 55122. Mailing address: P.O. Box 22268, St. Paul, MN 55122. Tel.: 651-379-6200; Fax: 651-379-6205; E-mail: info@quirks.com. Web address: www.quirks.com. Periodicals postage paid at St. Paul, MN and additional mailing offices.

Subscription Information: U.S. annual rate (12 issues) $70; Canada and Mexico rate $120 (U.S. funds); international rate $120 (U.S. funds). U.S. single-copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change.

POSTMASTER:
Please send change of address to Quirk's Marketing Research Review
P.O. Box 22268, St. Paul, MN 55122.

U.S. Postal Service Required by 39 U.S.C 3685 Statement of Ownership, Management and Circulation 1. Title of Publication: Quirk's Marketing Research Review. 2. Publication No.: 0893-7451. 3. Date of Filing: Sept. 1, 2020. 4. Frequency of Issue: Jan./Feb., Mar./Apr., May/June, July/Aug., Sept./Oct., Nov./Dec. 5. No. of Issues Published Annually: 6. 6. Annual Subscription Price: None and $70.00. 7. Complete Mailing Address of Known Office of Publication: 4662 Slater Road, Eagan, MN 55122-2362. Contact: Steve Quirk. Telephone: 651-379-6200. 8. Complete Mailing Address of the Headquarters of General Business Offices of the Publisher: 4662 Slater Road, Eagan, MN 55122-2362. 9. Full Names and Complete Mailing Address of Publisher, Editor, and Managing Editor. Publisher: Steve Quirk, 4662 Slater Road, Eagan, MN 55122 2362; Editor: Joseph Rydholm, 4662 Slater Road, Eagan, MN 55122-2362. Managing Editor: Not Applicable; 10. Owner: Quirk Enterprises, Inc., 4662 Slater Road, Eagan, MN 55122-2362; Stockholders: John P. Quirk, 6798 Redwood Ave. NW, South Haven, MN 55328, James T. Quirk, 3052 Arden Pl., Woodbury, MN 55129, Daniel M. Quirk, 4662 Slater Rd., Eagan, MN 55122-2362, Stephen R. Quirk, 4662 Slater Rd., Eagan, MN 55122-2362, Ann M. Quirk, 4662 Slater Road, Eagan, MN 55122-2362. Teresa K. Tweed, 16932 Hubbard Trail, Lakeville, MN 55044 11. Known Bondholders, Mortgagees, and Other Security Holders Owning 1 Percent or More of Total Amount of Bonds, Mortgages or Other Securities: None. 12. For Completion by Nonprofit Organizations Authorized to Mail at Special Rates: Not Applicable. 13. Publication Name: Quirk's Marketing Research Review 14. Issue Date for Circulation Data Below: July/Aug. 2020. 15. Extent and Nature of Circulation: Average No. Copies Each Issue During Preceding 12 Months: A. Total No. Copies (Net Press Run): 12,409. B1. Paid/Requested Mail Subscriptions Stated on Form 3541: 8,524. B2. Copies Requested by Employers for Distribution to Employees by Name or Position Stated on PS Form 3541: None. B3. Sales Through Dealers and Carriers, Street Vendors, Counter Sales, and Other Paid or Requested Distribution Outside the USPS: None. B4. Requested Copies Distributed by Other Mail Classes Through the USPS: None. C. Total Paid and/or Requested Circulation: 8,524. D. Nonrequested Distribution (By Mail and Outside the Mail). D1. Nonrequested Copies Stated on Form 3541: 3,524. D2. Nonrequested Copies Distributed Through the USPS by Other Classes of Mail: None. D3. Nonrequested Copies Distributed Outside the Mail: None. D4. Nonrequested Copies Distributed Outside the Mail: None E. Total Nonrequested Distribution: 3,524. F. Total Distribution: 12,048. G. Total Copies Not Distributed: 361. H. Total: 12,409. I. Percent Paid and/or Requested Circulation: 70.75% Actual No. Copies of Single Issue Published Nearest to Filing Date. A. 12,300; B1. 8,681; B2. None; B3. None; B4. None; C. 8,681; D1. 3,373; D2. None; D3. None; D4. None; E. 3,373; F. 12,054; G. 246; H. 12,300; I. Percent Paid and/or Requested Circulation: 72.02%. I certify that the statements made by me above are correct and complete: Stephen R. Quirk, Publisher.

10 minutes with...

Bessam Mustafa

Director, Fan Insights, Toronto Blue Jays Baseball Club

"We want to keep people in dialogue with us until we can welcome them back to the stands."

What surprised you the most when moving from supplier- to client-side research?

I think that everyone who makes the switch to client-side research realizes that they're suddenly an influencer as much as – or more than – they are a researcher. There's something a little bit humbling in knowing that decisions are going to be made with or without you, and you just hope that you can explain how they're made better with you in the mix. I'm fortunate to have arrived at an organization that was primed for a data-driven transformation when I got here, but I've spoken with many people taking client-side roles who are met with a wall of "we've always done it this way" naysayers.

Can you describe the biggest difference between fan/sports insights and more traditional corporate consumer research?

I think there are two pieces to this: the audience and the externalities.

I don't think many people would say that the relationship they have with their bank, insurer, drugstore or other commercial entity is central to their identity. Of course, it's the opposite with sports fandom – it can be very emotional and people invest themselves heavily into it. Response rates are seldom an issue for me now, because people want to influence this thing that is so important to them. It's a great problem to have – instead of trying to get people to focus on something that's not top-of-mind, you spend your time trying to craft instruments that get you the answers you want while still giving respondents an opportunity to go somewhere else with their feedback.

That's where externalities come in. Team performance can swing certain types of responses wildly in a way that is impossible to ignore but also very hard to parse out from the underlying questions we are asking. There's a saying that when the team performs well, the beer is colder and the lines are shorter. When you're losing, the beer is warm and you've spent half the game waiting for a stale hot dog.

What steps is the Toronto Blue Jays Baseball Club taking to continue capturing quality insights in this ever-evolving global crisis?

Since March our focus has shifted from optimizing the in-stadium experience to enhancing our virtual engagement opportunities. We want to keep people in dialogue with us until we can welcome them back to the stands. Over the past two years we have worked diligently to establish a feedback loop with fans who engage with us, knowing that we take their input seriously. For example, we have an insight community that we tap regularly and share plans and results with. We're continuing to survey them and solicit feedback with respect to the pandemic itself, how people's fandom is manifesting in these times and what we can do to keep people's attention until we can sell tickets again.

Read the full interview at www.quirks.com/articles/2020/20200922.aspx.