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For marketing research and insights professionals

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Quirk's Marketing Research Review
March/April 2021
Volume XXXV Number 2
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Matt (Client Solutions):
"Sue, I would like to remind our clients that we also do awesome quant work."

Sue (Marketing):
"Okay, Matt."

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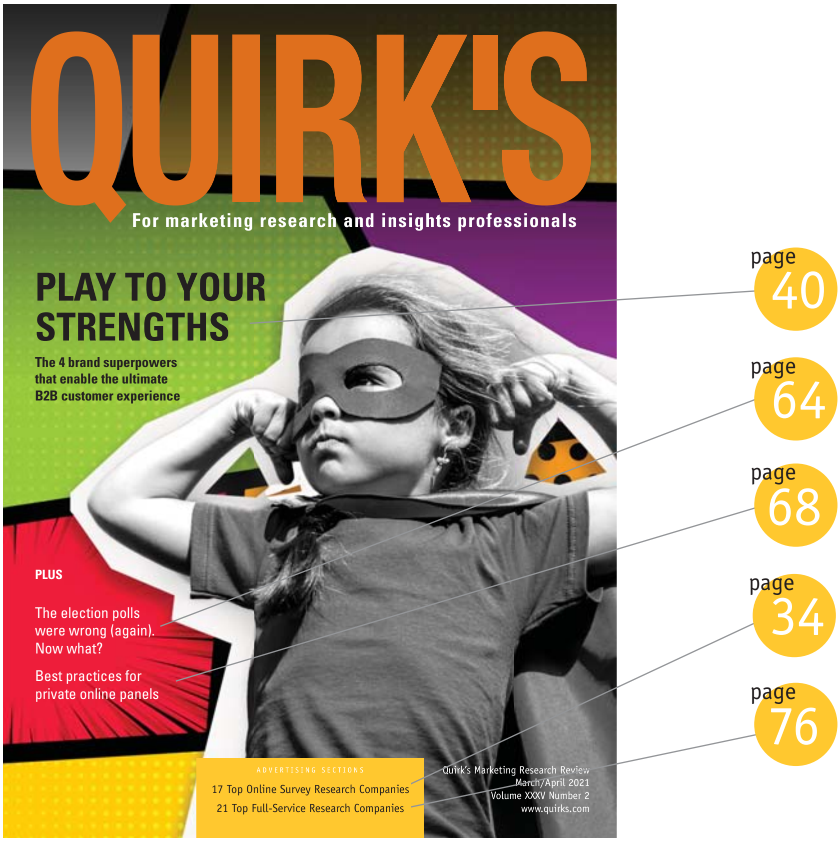

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••• events

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Q // E-newsworthy

The intersecting worlds of UX and qualitative research

https://bit.ly/2Mw39do

Why cognitive testing reaps ROI for market researchers

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Collective grief and qualitative research: Creating authentic connections in 2021

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Q // Noted Posts

Quirk's Blog

Considering the long-term impact: COVID-19: Survey Monitor

https://bit.ly/2YMcgJ8

Top industry adopters of recommended COVID-19 precautions

https://bit.ly/36Kmzlz

Research Industry Voices

Brexit and international marketing laws

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A shift toward sustainable products

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5 trends and predictions for market research in 2021

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Research Careers Blog

Leading growth: 7 "old-school" leadership qualities that curb success

https://bit.ly/3tFENP4

Engaging employees as brand ambassadors

https://bit.ly/3cJ5M68

Running remote meetings: 5 mistakes to never make

https://bit.ly/2YQfI5z

••• seniors

For senior-living industry, transparency is key

As with nearly every industry, the senior-living market has been impacted greatly by the COVID-19 pandemic. A survey of 250 adults over age 65, conducted by LevLane Inc., and MarketVision Research Inc., provides insight into just what the industry needs to do in order to quell the fears of prospective residents.

The study found that 64% of those surveyed who had been considering a move to a senior-living community pre-COVID were still interested in moving in within the next five years and, of those, 17% were very interested. However, that leaves nearly 35% who have been scared off by the pandemic and are now much less interested in the prospect of moving to a community setting.

What can the senior-living industry do to reassure their audience? Talk to them. An overwhelming 73% of respondents said that they would be much more likely to move to a community that speaks openly about its COVID-19 protections and prevention methods within its communications, with 70% of respondents saying the following six messages/practices would be important to hear from the community: the facility is meeting/exceeding state and local guidelines for senior-living communities; it is meeting/exceeding all CDC requirements for senior-living communities; transparency regarding residents and staff who have tested positive for COVID-19; the stringency of its COVID-19 testing protocols for staff and visitors; information regarding community requirements for mask use and facial coverings; and the ability to safely distance.

••• utilities research

Monopoly or not, c-sat valuable to utilities

As reported by EurekAlert!, satisfied customers mean increased profits even for public utilities that don't face competition, a recent study found.

Using data from U.S. public utility firms from 2001 to 2017, researchers found utilities – as currently regulated – have a cost-based incentive to deliver and improve their customers' satisfaction. For the average utility in their sample, a one-unit (on the 1 to 100 point ACSI index) improvement in customer satisfaction decreases operating costs by $29 million overall, through lowering customer service, distribution and selling and general administrative costs to $3, $8 and $13 million per year, respectively.

Their findings run counter to prevailing assumptions that providing higher service quality raises utility system costs. They found "robust evidence" that customer satisfaction did not affect rates (prices per unit) or demand (unit sales volume). But they did find unambiguous evidence that it leads to profits only by reducing utility operating costs.

Efficiency gains coming from improved customer satisfaction, trust and goodwill could lead to greater acceptance of costly new technology initiatives that utilities want to introduce, researchers said.

The study, Customer Satisfaction and Firm Profits in Monopolies: A Study of Utilities, appeared in the Journal of Marketing Research.

Trade Talk

By Joseph Rydholm, Quirk's Editor

For researchers, an uneasy optimism

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Joe Rydholm can be reached at joe@quirks.com

Their facial expressions spoke volumes. One after the other, as the client-side presenters told their stories during sessions in our two virtual Quirk's Events last year, you could see the mix of joy and hesitation as they spoke of how the pandemic had lifted the impact and visibility of their internal insights functions. Obviously elated at finally being sought out and listened to and depended upon instead of relegated, they also clearly realized the tragic societal backdrop against which these happy events were occurring.

But the upshot was clear: The much hoped-for seat at the table was finally open.

And now comes the toughest part: keeping it. That subject is just one of several themes explored in a joint report issued in January by three research industry groups. The organizations – the U.K.'s MRS, Australia's Research Society and the Insights Association in the U.S. – brought together 30 leaders from brands (Merck, Electrolux, L'Oréal, etc.) and research agencies (GfK, Zappi, Kantar, etc.) for roundtable discussions on the current state of life as a researcher. The resulting report, The Great Change Accelerator - Client & Partner Perspectives on the Future of Insights, is available for free (registration required) at https://cutt.ly/ikEH34y.

While there is no easy single answer for how to keep that seat at the table, you can glean a good action plan from the report's examples of what's helped boost the standing of insights during the pandemic: be ready when called upon to help; be creative; be decisive; be proactive rather than reactive; be agile; be open to less rigorous approaches (and be able to help your internal clients get to that headspace as well).

From the report:

"Corporate researchers we heard from are being challenged more now to consider what the brand should do tomorrow and next year, rather than report on what happened yesterday. Research and insight have too often been focused on past behavior, they say. Strategic foresight has once again been brought forward as a priority ... So, insights leaders are being asked to use data as a dynamic forecasting tool to help the organization scenario-plan around growth and investment planning. Important decisions about when to spend, where to spend and how to spend. Researchers are actively reviewing behavior change models ... Overall, insights must perform at the speed of decision-making in the boardrooms – that's the only way they can keep their seat there."

The report, which also includes five research vendor/partner themes along with five shared themes, stresses that many of the required adaptations will have to come from within researchers themselves. True, their actions and deliverables are what will influence/change how they are viewed by others in their organizations, but part of getting to that stage is rethinking what it means to be an insights worker.

"Corporate researchers noted a recent change from being the 'oracle' to the 'music conductor.' They mentioned that sometimes there is a need to retrain team members and partners to deliver the 'quick and the strategic,' that some of the resistance against speed is from within. To get into a new mind-set we have to change our own fundamental core professional roots – research does not need to be traditional; long and academic is not always needed. What do you need to know now? That is paramount."

Creativity and resourcefulness

One of the few positives to arise from the pandemic has been the awe-inspiring creativity and resourcefulness it has unleashed across so many aspects of our lives. From businesses pivoting to stay afloat to health care workers making the most of often meager supplies, people have adapted to the many barriers the virus has thrown at them. As our event sessions and the MR organizations' report attest, though they have been forced into new and at times uncomfortable roles, researchers have found ways to react on the fly and meet the fast-changing needs of their organizations. The success with which they have responded bodes well for the future of the industry, as long as they retain the lessons learned during this unprecedented time of upheaval.

The role of a researcher is to provide opportunities for transformational change

Perspectives from quantilope Co-Founder Thomas Fandrich

How is technology shifting the responsibilities of insights managers from metric providers to agents of change?

Technology is moving researchers from the passenger seat (buying and handing over insights) to the driver's seat (generating and interpreting insights on their own, faster than ever before). As a result, insights managers are experiencing more influence and impact on the direction of their company and are solving more unique, challenging business questions. Repetitive number-crunching and analysis should now be done by machines and algorithms, allowing researchers to focus on developing the right questions and the interpretations and storytelling of data that technology provides them.

By focusing on the creative – not the repetitive – side of research, insights leaders can act as agents of change for their organizations by having the time to uncover hidden consumer needs, gaps and unexpected opportunities. Keeping a constant pulse on your consumers empowers researchers to leverage real-time, high-quality insights to influence marketing and senior leadership teams to take action and develop competitive advantages.

The fundamentals of how and why brands do research were flipped upside down last year. What does the post-COVID-19 researcher look like?

COVID-19's biggest impact on the market research industry is just how much it accelerated it. By the end of 2019 and early 2020, many brands had already begun dipping their toes in advanced automated insights solutions, insourcing vs. outsourcing their research needs. However, when the pandemic hit, brands quickly realized just how vital it is to have full control over their research, to be able to run research quickly and efficiently – and in a budget-friendly manner! Being dependent on third-party providers results in hurdles, not opportunities, for today's leading brands. Outsourcing essential functions makes organizations less resilient in tough times compared to organizations who have the tools to operate autonomously.

The post-COVID-19 researcher will be resource-efficient with the tools to be remote work-ready. While the digitization of market research may be intimidating, it also provides the uncapped opportunities for brands to adopt new workflows (less fragmented work) and new platforms (automation of repetitive work), to take control over their data and to use even more consumer research in their business decisions.

quantilope

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What advice do you have for brands to optimize how their research departments work?

There are a few simple questions to begin optimizing how the insights functions within an organization work. And it all starts with why – why do we think we need to optimize how we are working as an insights team? What's wrong? Where is the friction, failures and bottlenecks? These questions will provide clues into what problems need to be solved to increase efficiency. The next step is to audit your full end-to-end research process and see where technology can replace mundane tasks.

Leading researchers of tomorrow will be those who prioritize technology to do research better, faster and more efficiently. We're at an exciting time in marketing research and it's up to us to be the driving force of change.

IN FOCUS

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

Q // Survey Monitor

••• travel research

Making the trip

Consumers are gaining confidence in international and domestic travel

COVID-19 was a blow for the travel industry but with the start of a new year and vaccines on the horizon lending hope to consumers, prospects are brightening. According to research from Tripadvisor, consumers are increasingly confident that they will travel abroad in 2021, particularly in the second half of the year. In fact, globally, the majority of hotel clicks on Tripadvisor are already shifting to international destinations for May 2021 trips onward (as opposed to domestic destinations, which dominated 2020).

Nearly half (47%) of travelers surveyed globally say they are planning to travel internationally in 2021, including 45% of U.S. travelers. One in 10 (11%) global respondents have already booked an international trip for 2021, including 14% of respondents in the U.S. The most eager to venture abroad are German and U.K. travelers – in the first week of January, 85% of hotel clickers on Tripadvisor in either country were planning international breaks for later this year.

When it comes to consumer confidence, though, vaccines are a driving force. The widespread rollout of vaccines won't just impact travelers' confidence to travel, it will have a major influence on where leisure travelers are prepared to go.

Globally, more than three-quarters (77%) of travelers surveyed say they will be more likely to travel internationally if they receive the vaccine, rising to 86% for travel domestically. In the U.S., those numbers change to 69% and 80%, respectively.

More than a quarter (26%) of respondents globally say that they would only travel to destinations that required visitors to be vaccinated before travel, with Australian (32%) and U.S. (30%) travelers the most likely to expect destinations to adopt this safety measure.

While international tourism looks to be getting a boost this year following a shutdown for much of 2020, domestic travel isn't necessarily going to take a back seat in 2021. In the first week of January, nearly 70% of hotel clickers on Tripadvisor were booking future domestic trips, while further out, May through August are still proving the most popular months for domestic vacations.

Globally, three-quarters (74%) of travelers surveyed plan to take at least one overnight domestic leisure trip in 2021 – and an enthusiastic 80% in the U.S. In the U.S, just over a third of respondents (34%) are planning at least three domestic trips this year, compared to 31% of Australians surveyed and 24% of British travelers.

With travel plans dashed in early 2020, many people have been dreaming about their next big vacation for more than 10 months, so it's no surprise that travelers are extra conscious of getting it just right. Three-quarters (74%) of travelers surveyed globally say they will spend more time choosing a destination this year, including 65% of travelers in the U.S. Sixty-four percent of travelers in the U.S. will spend more time reading reviews, 63% will spend more time selecting their accommodation and 70% will spend more time finding things to do.

As in-person dining was restricted in many countries throughout 2020, the success of takeout and delivery services soared, as consumers sought to satisfy their appetite. But encouragingly for the hospitality industry, in-person dining's rebound in 2021 doesn't mean a decline in takeout and delivery demand.

Nearly half (47%) of respondents globally say they plan to dine in-person at restaurants more often in 2021 than they did in 2020 and a quarter of respondents (27%) say they plan to order more

takeout meals this year. In the U.S., 54% of respondents plan to dine in-person at restaurants more often this year and 38% plan to order more takeout

The study was conducted by Tripadvisor in partnership with Qualtrics and surveyed 2,330 consumers from the U.S., U.K., Australia, Italy, Singapore and Japan.

••• shopper insights

Under review

Study looks at the influence of user-generated content on e-commerce

Who better to advocate for your brand than the people already enjoying it? Recent research from Bazaarvoice, a provider of product reviews and user-generated content (UGC) solutions, reveals visual and social user-generated content is driving online retail purchases. Over half (51%) of global consumers agree social media influences purchases and 65% find the availability of previous customer photos on social media and websites essential in their purchase decision. In addition to social media, almost three-quarters (74%) of consumers prefer to see previous customers' photos and videos on brand and retailer websites rather than professionally shot images. In fact, 62% of consumers are more likely to buy if they can view both photo and video content from previous customers.

As the most-used social media network globally, Facebook is also the most popular destination when it comes to influencing purchases (25%) and the most likely social platform for consumers to purchase a product on (26%). Among 18-34-year-olds, however, Instagram is the most popular destination, with 31% using it as their main source of inspiration and 27% saying it is the most likely place for them to buy.

Younger shoppers demonstrate a particularly strong preference for visual UGC on social media, as 73% of 18-34-year-olds prefer it when brands use visual UGC for social media outreach compared to an average of 64% across other age groups.

Shoppable images and videos are the type of content most likely to influence buying choices on social media (19%), ahead of video advertising (14%) and posts from followed brands (13%), suggesting rich content and the ease of buying on-platform are now critical in the customer journey.

However, it's important that the content stays fresh – almost half (47%) of consumers want to see new UGC on social media at least two to three times a week, with 10% of those expecting updates multiple times a day.

Visual UGC is most important for products that are typically higher in value, as consumers seek evidence and certainty about its quality, as well as the accuracy of the description before buying. For over a third of consumers (36%), technology and electronics is the most important category for reviewing photos and videos from other customers prior to purchase.

When it comes to trusting the authenticity of a review when making a purchase, the quality of other customer reviews is the top priority (45%) compared to how recently a review was posted (32%) or the number of reviews a product has from previous customers (23%).

The quality of a review depends on the viewer, however. For one-in-five consumers (21%), a quality review is judged to be one that includes photos and videos as well as text, more so than a well-written review with good spelling and grammar (16%) or a review that clearly states when a product was purchased (11%).

The research was commissioned by Bazaarvoice and conducted in November and December 2020 by Savanta among 8,051 consumers from the U.K., U.S., Canada, France, Germany and Australia.

••• health care research

The doctor will Zoom you now

Health care providers cite key benefits of virtual care

While the pandemic created an immediate need for virtual health care platforms, it also highlighted the advantages these platforms hold for future use. Virtual care delivery platform Noteworth looked into the ways in which digital medicine platforms have helped organizations navigate the challenges presented by the COVID-19 pandemic and found that, of the more than 250 medical professionals surveyed, two-thirds (68%) believe that health care organizations will continue engaging with patients via digital health care platforms post-pandemic.

The COVID-19 pandemic has created many challenges for America's health care community. For a growing number of health systems and group practices around the country, greater use of digital medicine platforms will continue to be a way to treat patients effectively without a disruption in care due to pandemic-related factors. Eighty-six percent of those surveyed felt that digital medicine platforms have greatly stepped up their ability to deliver care and increase efficacy with their patients. Additionally, 47% noted that having a specialized data report that gives an overall view of the patient's medical history was a key element in navigating the challenges that arose due to the pandemic.

A majority of respondents (59%) said that the most significant benefits of using digital medicine platforms are remote monitoring and management for improved care. In addition, 56% said that patient engagement was a key advantage while another 49% said better access to care played a big part in the benefits of digital medicine.

Eighty-five percent of health care providers noted social distancing as a way in which they have worked to protect patient safety during COVID-19. Fifty percent said that virtual video visits were the most important for health care providers to deliver the best virtual care services through a digital health care platform.

The survey was conducted in December 2020 via SurveyMonkey and sampled more than 250 U.S.-based health care professionals.

••• retail research

Delivering success

2020 forced retailers to up their fulfillment game

In 2020, the retail industry faced immense challenges as many retailers were ill-equipped to immediately and effectively meet consumers' changing demands. Bringg, a delivery and fulfillment cloud platform provider, surveyed 1,000 U.S. enterprise retailers and brands to uncover current strengths and weaknesses in online fulfillment capacity and a variety of fulfillment services, as well as top fulfillment priorities for 2021.

Many of those surveyed invested in new fulfillment channels since the beginning of the pandemic, including curbside pickup (51%), buy online pickup in store (BOPIS) (33%), alternative pickup locations (28%) and same-day delivery (27%). Though these channels proved to be effective throughout the pandemic and over the holiday season, retailers have recognized the need to continually invest in fulfillment capabilities and adjust current capabilities.

Retailers and brands surveyed reported that they are prioritizing adding alternative pickup locations (30%) and BOPIS (24%) in the next six to 12 months. However, less than half of the retailers surveyed work with a technology vendor to streamline operations.

When it comes to scaling delivery, the biggest pain points are working with multiple fleets (36%), scheduling delivery times with customers (30%) and lack of real-time visibility once the order is out for delivery (20%). In terms of working with external fleets for delivery, the biggest pain points were lack of visibility (39%), lack of brand control (31%) and cost (29%). Survey respondents indicate that the pain points associated with delivering on time include the number of drivers available (29%), dispatch and routing issues (20%) and travel distance between warehouse or retail location and delivery point (19%).

••• brand research

Platform to purchase

Study identifies top media channels for marketing

The term "choice overload" has often been applied to the way in which consumers are faced with an ever-increasing number of options – and the term is fitting for the swath of media platforms now available as well. However, the growing availability of these platforms presents a challenge for marketers and brands as well, who are faced with the enormous task of choosing between the various platforms or prioritizing one over the other. And thanks to the events of the past year, consumer habits have further changed, making the task of marketing and advertising even more difficult. In the last months of 2020, Borderless Access conducted an online study to find out which platforms consumers prefer and trust. The study also examined how U.S. consumers differ in their platform preferences from other countries.

Not surprisingly, most people around the world (74%) were exposed to brand messaging on social media platforms, followed by television (67%). Interestingly, in the U.S., the majority of people (67%) were exposed to ads on television, followed by social media platforms (66%).

When narrowed down to online channels alone, the study revealed that the majority of Americans (56%) are exposed to brand messaging on social media platforms, followed by e-mails and online ads at 45% and 44%, respectively. Notable here is the fact that a significant number of Americans are exposed to ads and brand promotions of some kind over e-mail, which is not the global norm, where e-mails are preceded by social media platforms, online ads, digital newspapers and online forums.

The ubiquitous nature of social media means that ultimately, digital platforms most effectively convert brand messages into purchases. Forty-eight percent of U.S. respondents said they had made a purchase or used a service or a product after being exposed to a brand message on a social media platform. However, 44% of U.S. respondents also credited their product or service used to brand messaging on television. This behavior is consistent with the global average.

Trust can be an important factor in a consumer's decision-making process for specific products and services and as such, it is a key point for marketers when promoting the same. In 2020, television and print media were the most trusted in the U.S. for product or service information, while social media was on the lower end of the trust scale. Even for news consumption, television was the most trusted platform in the country, followed by radio and print magazines. This is consistent with the global viewer perception, where television leads in terms of trust.

Among online channels, search engine results are the most trusted by American consumers searching for product or service information, as is the case with consumers globally. Meanwhile, digital newspapers are the most trusted sources of news in the U.S.

As much as we're exposed to digital media platforms, however, these channels have not completely overridden consumer trust and affinity toward traditional media. In the U.S., 41% of consumers want to be able to rely on digital as well as print media, while 20% trust traditional media more than digital. Meanwhile, 11% of Americans said they have completely stopped using print media, which is lower than the global average of 9%. Of that number, 21% have quit print media since the pandemic.

••• automotive research

Driving safe

COVID-19 has kept prospective vehicle owners cautious

The COVID-19 pandemic created immediate, visible uncertainty but it also affected consumers in more subtle ways. To better understand how this uncertainty among consumers impacts the automotive industry, Deloitte surveyed more than 24,000 consumers in 23 countries and found that key areas of uncertainty lay in electric vehicle adoption, financial security and digital services.

Before the transportation torch is officially passed from internal combustion engines (ICE) to electric vehicles (EVs), consumers require greater assurance around mileage, robust charging infrastructure rollouts and affordability of the electric segment. While the pandemic continues to play a large role in exacerbating doubts, stricter carbon emission regulations on the horizon point to a "closing window" for the traditional ICE segment experience.

Motivated by a sense of familiarity and financial concerns due to COVID-19, consumers across the globe are showing a near-term reluctance to switching away from ICE technology. Just one-quarter (26%) of U.S. consumers are considering alternative engine solutions for their next vehicle, down 15% year-over-year.

The top concern about EVs in both the U.S. and Germany is battery range (28%), whereas lack of charging infrastructure is top of mind in Asia (the Republic of Korea at 32%, Japan at 29% and India at 26%).

While the majority of consumers in the U.S. (71%), Japan (71%), Germany (64%) and India (63%) expect to charge their vehicles at home, more than half (51%) of respondents in China intend to make use of available charging stations at their place of work or on the street instead.

Consumer perception of connected vehicles appears to be edging up in Asia, with as many as 83% of consumers in China finding the technology beneficial; that number is just about half in the U.S. (44%).

With increased connectivity, 64% of U.S. consumers are most concerned about the possibility of hacking, which is shared among consumers in Germany (64%), the Republic of Korea (64%) and India (66%).

Advanced vehicle features that promote greater safety capabilities, such as blind-spot detection, are most appealing to U.S consumers (70%), whereas Germany also ranks built-in navigation systems as their most important future vehicle option at 65%. However, cost continues to be a limiting factor for advanced vehicle technologies with 74% of U.S. consumers unwilling to pay more than $500 for infotainment.

Another factor influencing future vehicle ownership across the globe is financial concern. Due to the COVID-19 pandemic, consumers in many markets are rethinking not only when they will be buying their next vehicle but also what type of vehicle they will buy next. As the risk of affordability concerns increase, a growing number of people are deferring vehicle loan/lease payments with some intending to acquire a less expensive vehicle than originally planned.

One in 10 Americans have opted to defer their automotive payment in 2020, but that rises to 23% among consumers aged 18-34. While the vast majority (84%) of U.S. consumers plan on purchasing a similar vehicle in the future, more than half of consumers in India (57%) plan to enter a completely different vehicle segment as a result of the pandemic.

Timelines for acquiring their next vehicle varies greatly, with 66% of U.S. consumers remaining on initial timelines. In contrast, roughly one-third of consumers in India (38%) and the Republic of Korea (32%) plan on delaying their next vehicle purchase.

The COVID-19 pandemic has given rise to more virtual transactions but certain aspects of the buying process remain difficult to digitize, reinforcing the consumers' desire for an in-person experience.

U.S. preferences remain largely in favor of in-person sales experiences (71%). In contrast, consumers in India look to be the most open to a virtual transaction in the automotive space with almost one-third (27%) indicating a fully virtual buying experience is preferred.

Authorized dealers will remain a part of the virtual buying process with more than half (59%) of U.S. consumers preferring to interact with a franchised seller. Having the ability to see the car in-person remains a major deterrent for fully virtual sales noted by 75% of U.S. consumers, in addition to respondents in Japan (80%) and Germany (76%). Similarly, more than half (59%) of consumers in China listed the physical test drive of a vehicle as a deterrent to a fully virtual transaction, as did 64% of U.S. respondents.

One virtual transaction that engenders a high level of interest globally is "virtual servicing," where a vehicle is picked up from a home or office when it needs service. Consumers in the U.S. (46%), the Republic of Korea (70%) and Japan (67%) are largely in favor of the added convenience, provided it comes free of charge.

••• COVID-19 research

Phone, keys, wallet, mask

Brits have hygiene concerns in public spaces

Throwing on a mask before entering a grocery store and getting a squirt of hand sanitizer on the way out has become second nature to most, with hygiene concerns related to COVID-19 effectively changing the way we view spaces and surfaces that used to seem harmless. For 58% of Britons, it's no longer comfortable to use public devices such as card readers, with 54% feeling the same way about public toilets. These findings come from a survey of 2,160 adults commissioned by Sagentia, which wanted to understand how people's attitudes, behaviors and priorities have changed due to the pandemic.

Eighty percent of Britons are paying more attention to handwashing and cleanliness. Of these, 70% say it's because they can't be sure other people share their hygiene standards. However, most people feel a high level of personal responsibility. Among those whose behavior has changed, 71% say it's because they want to reduce their risk of infecting other people and 65% want to do everything they can to protect their family. Just over half (54%) say they have made changes because they want to follow the recommended government guidelines.

The findings also reveal that COVID-19 has made many people more aware of the role science can play in informing decisions about the products they buy. This was true for a quarter of the general population (25%), whereas two in five (43%) said they were fully aware before the pandemic.

Attitudes toward work, shopping and leisure activities were covered by the research too. It found that 31% of people feel uncomfortable going into a shared workspace or office, 35% feel uncomfortable eating in a fast-food restaurant or café and 33% are uncomfortable taking part in a group class at the gym.

Some respondents (11%) indicated that using extra packaging on products would be reassuring. However, 47% said they worry that there has been an increase in single-use plastic due to COVID-19 and 40% worry that the topic of climate change has taken a back seat.

Alongside the consumer research, Sagentia ran an industry study asking businesses how they would respond to consumer behavioral change. Of those surveyed, 73% expect changes prompted by COVID-19 to influence research and development priorities. Almost half anticipate innovation in areas such as chemicals and materials science, for instance to develop antiviral coatings. Almost a third (32%) expect advancements in mechanical or physical technologies to improve hygiene, with 20% saying this is likely to involve energy or light-based sanitization.

The survey was conducted by YouGov on behalf of Sagentia and surveyed 2,160 British adults from October 5-6, 2020.

INNOVATIVE PRODUCTS & SERVICES

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

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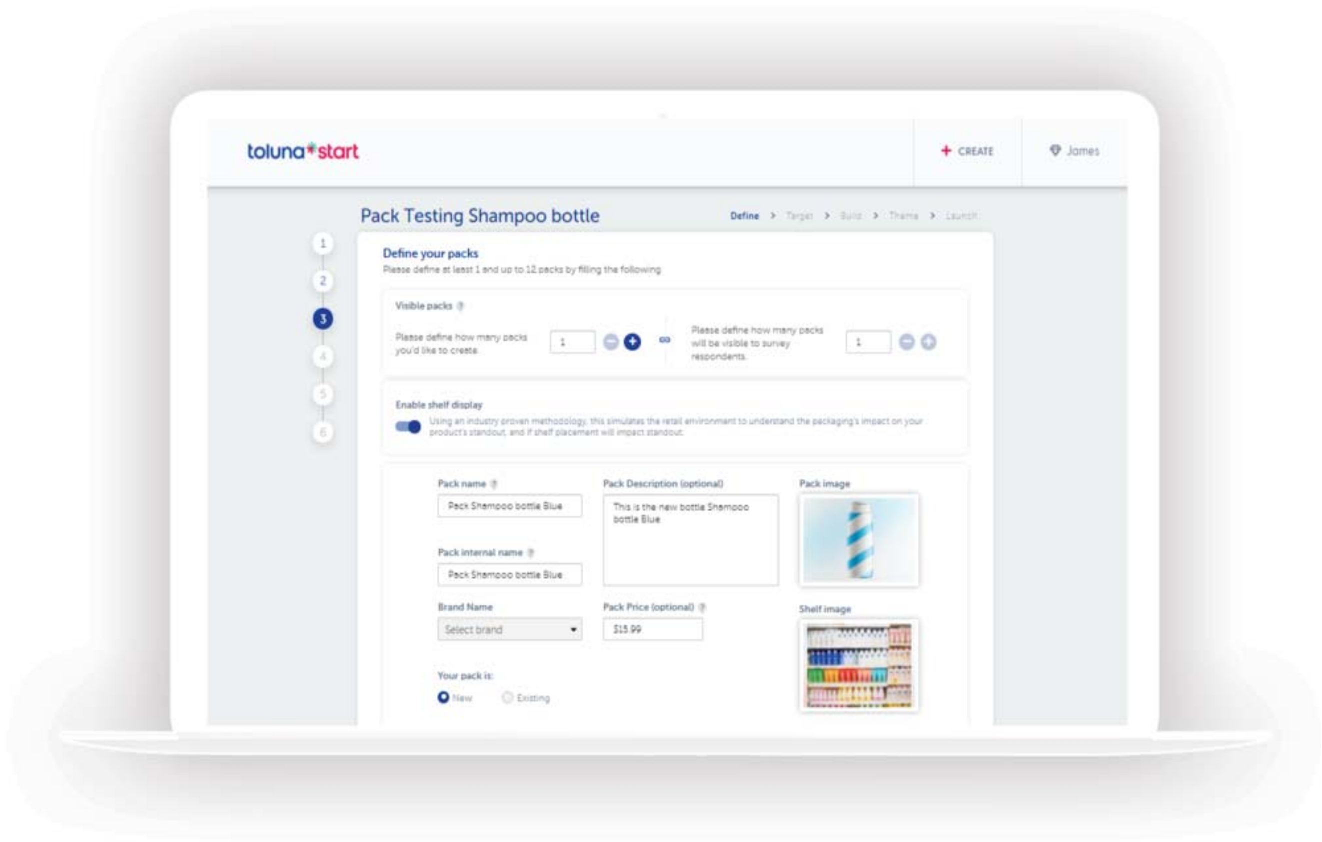

toluna

With shoppers abbreviating in-store visits, standing out on the shelf is more important than ever

Research has consistently shown that a huge proportion of shopping decisions are made in-store. That means the vast majority of shoppers are making their decisions based on what they see when they enter the store. And, in a pandemic-related development, shoppers are dramatically abbreviating their in-store visits, making decisions faster than ever before. Obviously, this environment puts millions of dollars on the line for manufacturers and retailers, making it critical that package and shelf designs instantly capture the attention of shoppers and prompt them to open their wallets.

In the past, manufacturers sent representatives into retail outlets to optimize these all-important shelf designs, based on input from in-store surveys and focus groups. Now however, pandemic-related limitations have made that practice all but disappear. Increasingly, consumer insights professionals and brand marketers are turning to the virtual reality of a shelf testing platform to help them ensure that shoppers are met with appealing package design, perfect pricing and ideal shelf placement. Toluna Start provides an automated solution with customizable methodology, an indispensable tool not only for manufacturers but also for retailers seeking guidance through the restocking process.

Here's the key point: the shelf testing tool literally re-creates the shelf environment, so respondents – chosen from Toluna's wide-ranging global community – can make choices as if they were standing before a real-life, in-store display. And advanced analytics mean that actionable data is delivered in real time, enabling agile decision-making in the turbo-charged retail environment.

Importantly, users can custom-tailor the tool to provide exactly the level of functionality they need. On one hand, they can choose a streamlined, agile approach featuring static images presented to respondents. Or, on the other end of the spectrum, they can create 3-D models that allow respondents to virtually pick up an item and assess it in detail from all sides, with a zoom feature to enhance texts and images. And the advanced heat-mapping function zeroes in on specific areas of a product or shelf design, highlighting respondents' likes and dislikes. This provides invaluable data about package design or shelf configuration – including percentages of respondents that were attracted to a specific feature. The end-result is a comprehensive cache of actionable data.

While it's uncertain exactly how the in-store and online shopping environment will evolve, it's clear the geography will continue to change. Manufacturers and retailers need the speed and flexibility Toluna's shelf testing product provides to stay ahead of the curve.

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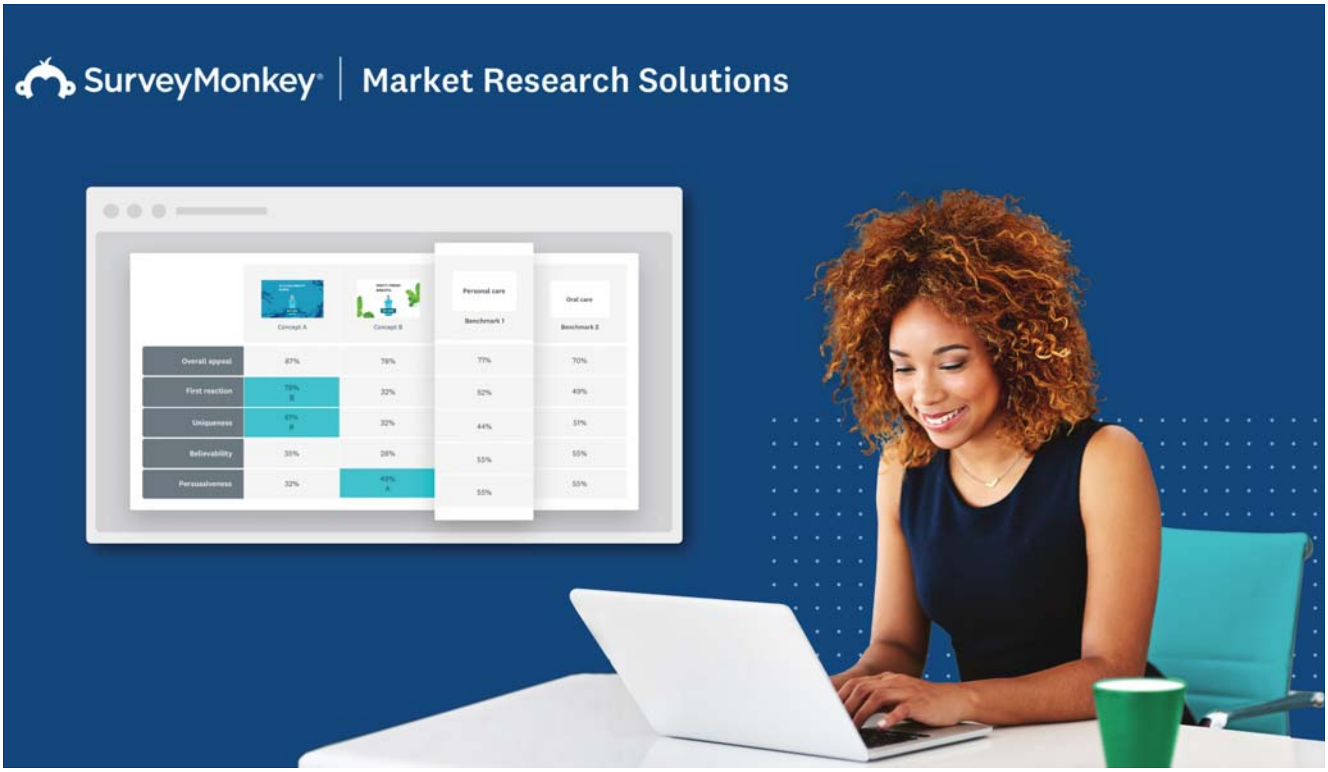
tolunacorporate.com/product/toluna-start



Agile concept and creative testing with SurveyMonkey's expert solutions

These days, markets are changing faster than ever and you need a fast, reliable way to validate your ideas. But full-service agencies take weeks or months to deliver the results you need now. That's why SurveyMonkey has spent the last couple years engineering a new suite of seven expert solutions so you can test product and marketing concepts faster than ever – you'll have presentation-ready insights in a matter of hours.

"Honestly, I'm almost at a loss for words because I'm just thinking about how much time this saves and how many insights we may have overlooked because we didn't have AI-Powered Insights doing it for us," said a director of consumer insights at a major U.S. skincare brand.

Intrigued? Here's how SurveyMonkey's new expert solutions will improve your concept-testing process:

1. **Leverage our expert methodology.** Easily customize your study with our built-in monadic methodology designed to minimize survey fatigue. Simply choose from our default set of attributes – or create your own.
2. **Gather high-quality data.** Instantly reach your ideal target audience via our trusted global panel, SurveyMonkey Audience, that ensures high response quality. Whether you need consumer or B2B respondents, we've got you covered.
3. **Compare with industry benchmarks.** Simply getting a set of scores won't tell you how your concept will perform in the market. See how your concepts stack up to industry benchmarks generated from real, top-performing concepts in your product/service category.
4. **Eliminate manual data formatting:** Reduce the time spent on analysis thanks to instant scorecards with stat testing, crosstabs, text analysis and beautiful native PowerPoint exports. And SurveyMonkey's innovative, new AI-Powered Insights will comb through hundreds of filtered segments of your data to find groups that have responded in a unique way, saving you hours of digging and serving up "aha" moments.

It's easy to get started with the level of support you need: you can create and launch a project completely on your own or work with our team of research experts to get you going.

So, if you need to test product concepts, packaging designs, ads, messages, claims, names or logos, you'll want to check out SurveyMonkey's expert solutions. Contact us for a demo or to explore a proof of concept.

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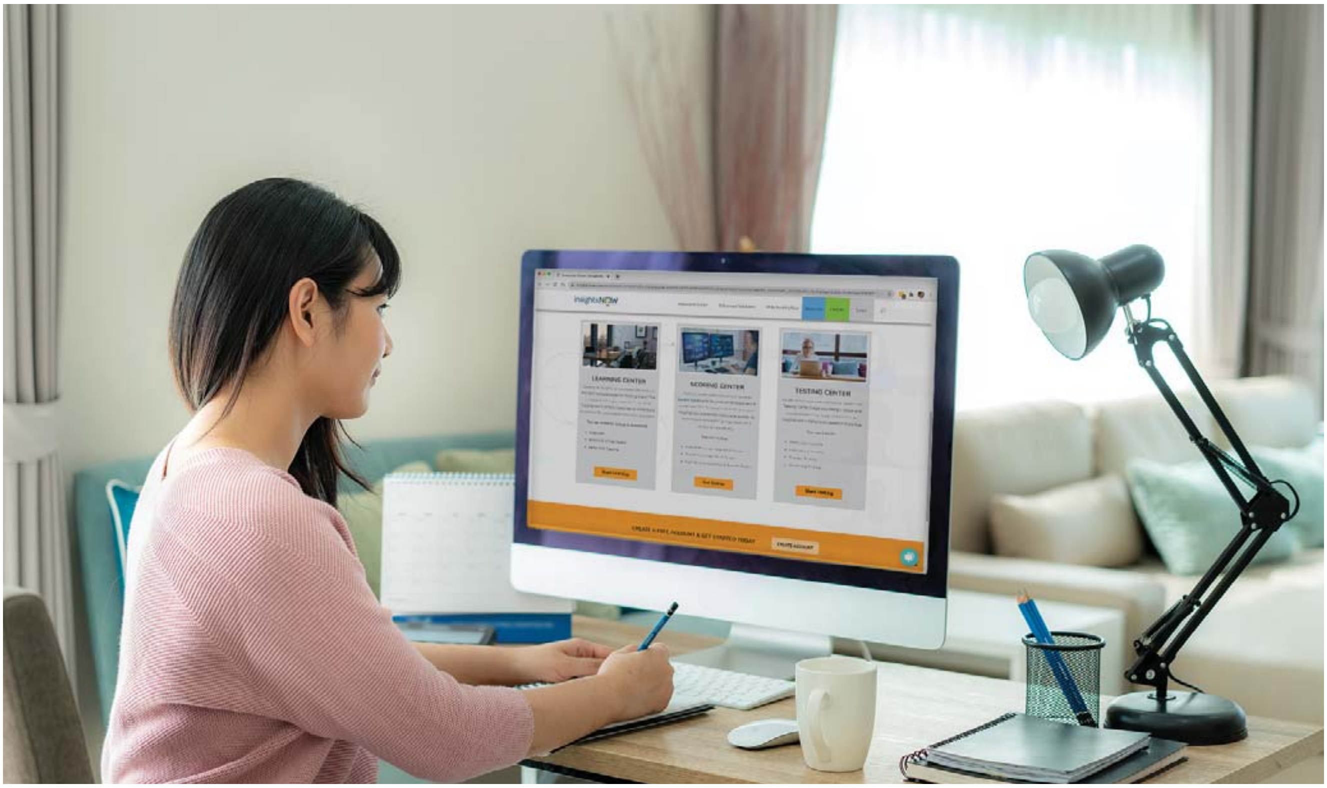


The Innovation Center – Where internal expertise meets the latest technology

In today's world, we must find creative, collaborative and innovative market research solutions –working together to invent the best way to get the insights needed. It is essential to have a passion for discovering people's beliefs, behaviors, triggers, cues and motivations to help identify unexpected human truths that inform and inspire. And these discoveries fuel business success.

Creative and collaborative solutions for success

Being flexible in an ever-changing world means having lots of choices for implementation. Through InsightsNow, solutions can be provided via custom approaches and through assisted research tools based on proprietary behavioral frameworks to help you find answers faster, improving speed to and success in market. Some of the areas include:

- **Front-end innovation:** Using a discovery process to find white space for innovation helps you strategically set the stage for true and deep differentiation from competitors.
- **Innovation and product development:** Leveraging research methods that go beyond the surface of consumer preference into what truly drives consumer behavior results in greater in-market success and better innovation cycle decisions.
- **Brand positioning and messaging:** Examining the interconnections of all the elements of a brand helps you understand how to position your brand for growth and how to communicate about your brand, product or service to target audiences.

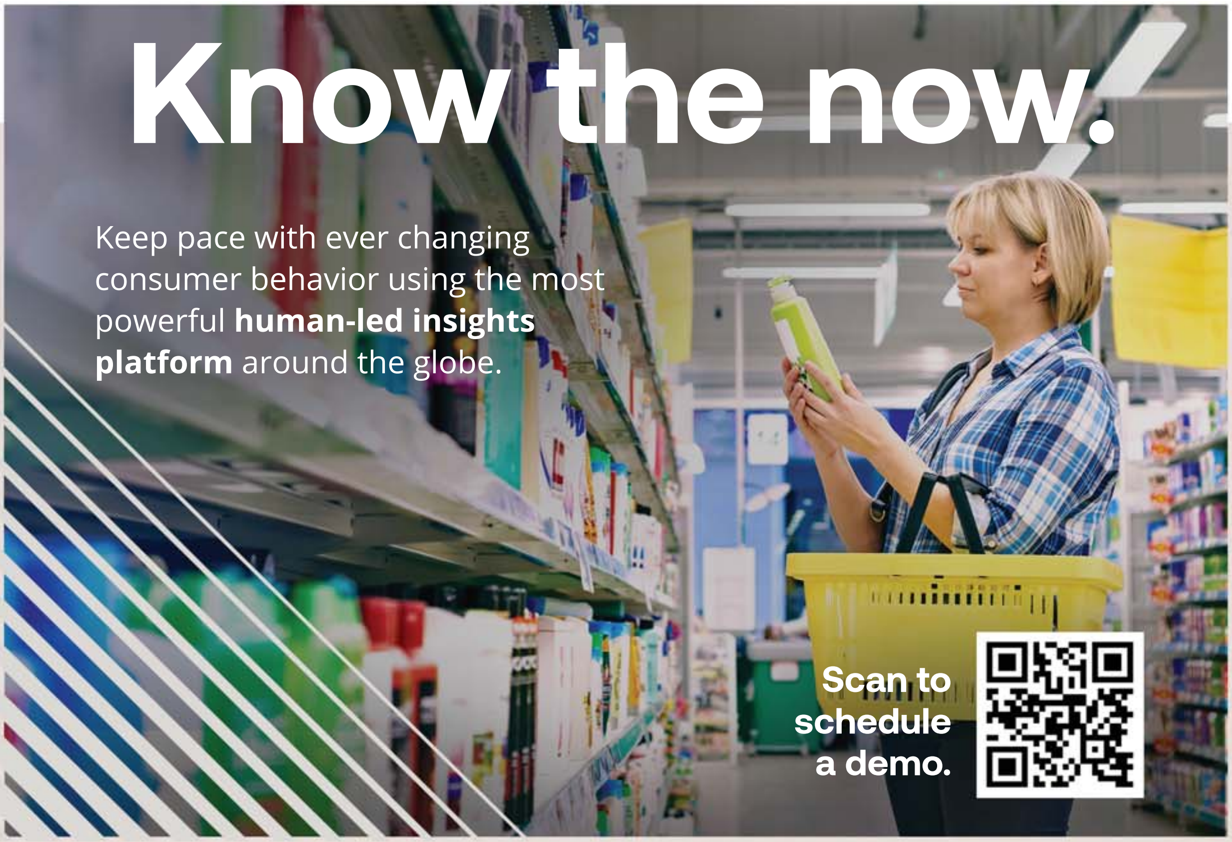
Expertise meets the latest technology

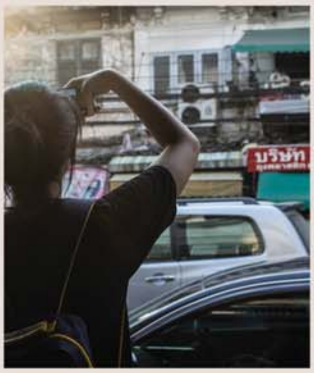
InsightsNow recently launched The Innovation Center – where internal expertise meets the latest research technology. This unique hub gives you instant access to thought leadership, proprietary behavioral scores and research methods to help design and redesign the most impactful consumer products and messaging. The InsightsNow Innovation Center portal includes:

- **Learning Center**: A resource for understanding the "why" behind consumer behaviors, where you can access behavioral reports, case studies, webinars, white papers and tracking studies.
- **Scoring Center**: A database of behavioral consumer scores where you can track consumer reactions to ingredients and their perceived benefits and associations.
- **Testing Center**: An easy interface that streamlines study scoping and execution where you can design and launch new conceptual, product or message testing projects in minutes.

InsightsNow is a full-service, award-winning behavioral research firm that partners with companies across a wide array of industry verticals to accelerate business decisions. We specialize in supporting companies' creation of disruptive innovations for achieving a cleaner, healthier, happier world. By partnering with InsightsNow, you can delve into the "why" behind human behavior to quickly drive greater business success. We work with clients to design research to address challenges and accelerate innovation by focusing on consumer behaviors and emotional drivers.

www.insightsnow.com
info@insightsnow.com





Simply field research.

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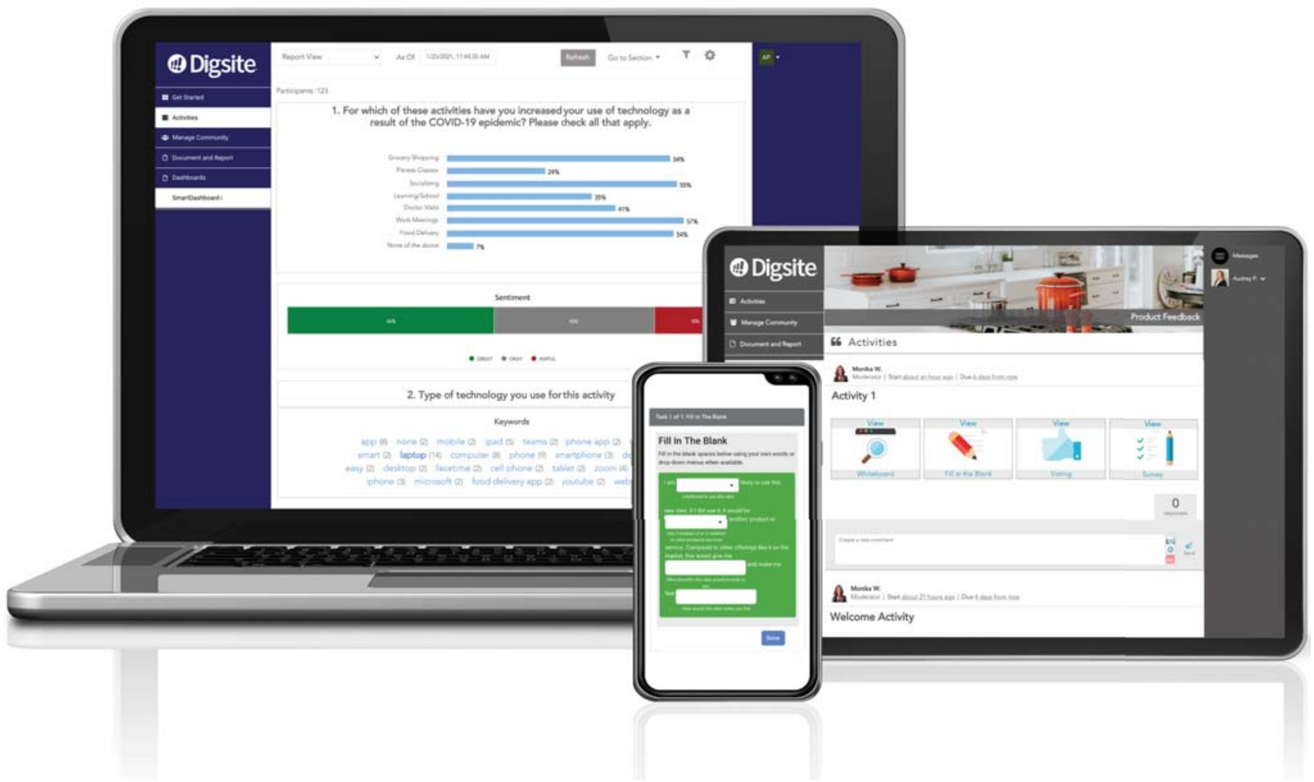


Digsite: Qual+quant technology for client-side teams

Looking for better research technology? You're not alone. Now more than ever, insights pros are seeking technology solutions to manage faster timelines, limited resources and tight budgets. Digsite offers a leading one-stop solution for product, marketing, shopper and CX/UX teams seeking more agile qualitative iteration and quantitative validation.

Digsite Pulse = Quantitative validation

Digsite Pulse helps teams pick winning opportunity areas, concepts, ads and more. The technology includes customizable study templates to conduct overnight tests with hundreds of consumers as well as AI-enabled dashboards for real-time analysis and reporting. With Digsite, researchers can bring quantitative participants into a qualitative study to drill even deeper.

Digsite Sprints = Qualitative iteration

Digsite Sprints foster collaborative development of big ideas by enabling teams to learn and iterate with a group of targeted consumers. Teams can recruit participants in as little as 24 hours and engage them for as long as they need. Digsite Sprints are one of the most flexible qualitative technologies on the market, enabling teams to engage in group discussions, capture photos and videos of experiences and even schedule live video interviews.

Learn, iterate and validate faster

The engine behind Digsite's technology is its proprietary SocialFind recruiting and national panel of more than a million households. This high-quality sample enables participant engagement that goes beyond traditional survey questions with unique quant+qual tasks like image mark-up, fill-in-the-blank stories and interactive voting. Teams can see the quality firsthand though the photo/video artifacts they collect and share, including an integrated video library with automated transcripts and clip-reel creation.

Better automated reporting on demand

Digsite's SmartDashboard uses the latest automated reporting technology to deliver top-line results with interactive charts, sentiment analysis, keywords and pinned quotes. SmartBenchmarking makes it possible to instantly compare results across concepts and benchmark to prior studies. SmartComparison lets you see results from subgroups of consumers side-by-side. Digsite also offers PowerPoint downloads with editable charts so you can build customized presentation-ready reports.

Expert support when you need it

Got a lean research team? Unlike most technology platforms, Digsite offers both assisted DIY technology and consulting services for setup, recruiting, design, moderation and reporting. That means Digsite subscribers can easily shift between DIY or full-service support as priorities or timelines change.

Finally, qual+quant living together in harmony

Overall, Digsite helps teams move quickly from quant to qual (and back again) in one integrated platform. That's flexibility!

Digsite | Insights for Innovators.

www.digsite.com

Glocalities Insights Solution – Profile your target audience instantly in 35 countries

For effective marketing, organizations have a constant need for real-time access to accurate and reliable data which goes beyond their own product category. Brands not only need to know which products their consumers use but also what their consumers try to achieve in life, what makes them tick and how and when to engage with them. However, many organizations do not have the means or the time to conduct such large-scale studies, let alone take cross-cultural differences into account. To help brands with this demand, Glocalities developed the Glocalities Insights Solution, a fast and cost-effective platform to really understand consumers and target audiences all over the world.

Innovation

The World of Glocalities Insights Solution is a research-based DIY analytics tool running in any web browser. It provides instant access to data from over 150,000 consumers from 35 countries and contains more than 2,000 consumer profiling variables. Presented in a visual and intuitive way, the Glocalities Insights Solution lets you pick and profile your target audience from every angle.

Positioning

At the core of this analytical tool lies the Glocalities database, based on the unique Glocalities research program spanning multiple years and containing information about trends, lifestyle and cross-cultural values. The database contains unique data about the values and lifestyle of consumers across the globe and gives an insight into who they are with respect to:

- media consumption
- persuasion tactics and communication styles
- lifestyle and trends
- political preferences
- values and mentality
- sustainability preferences
- archetypes, socio-demographic characteristics

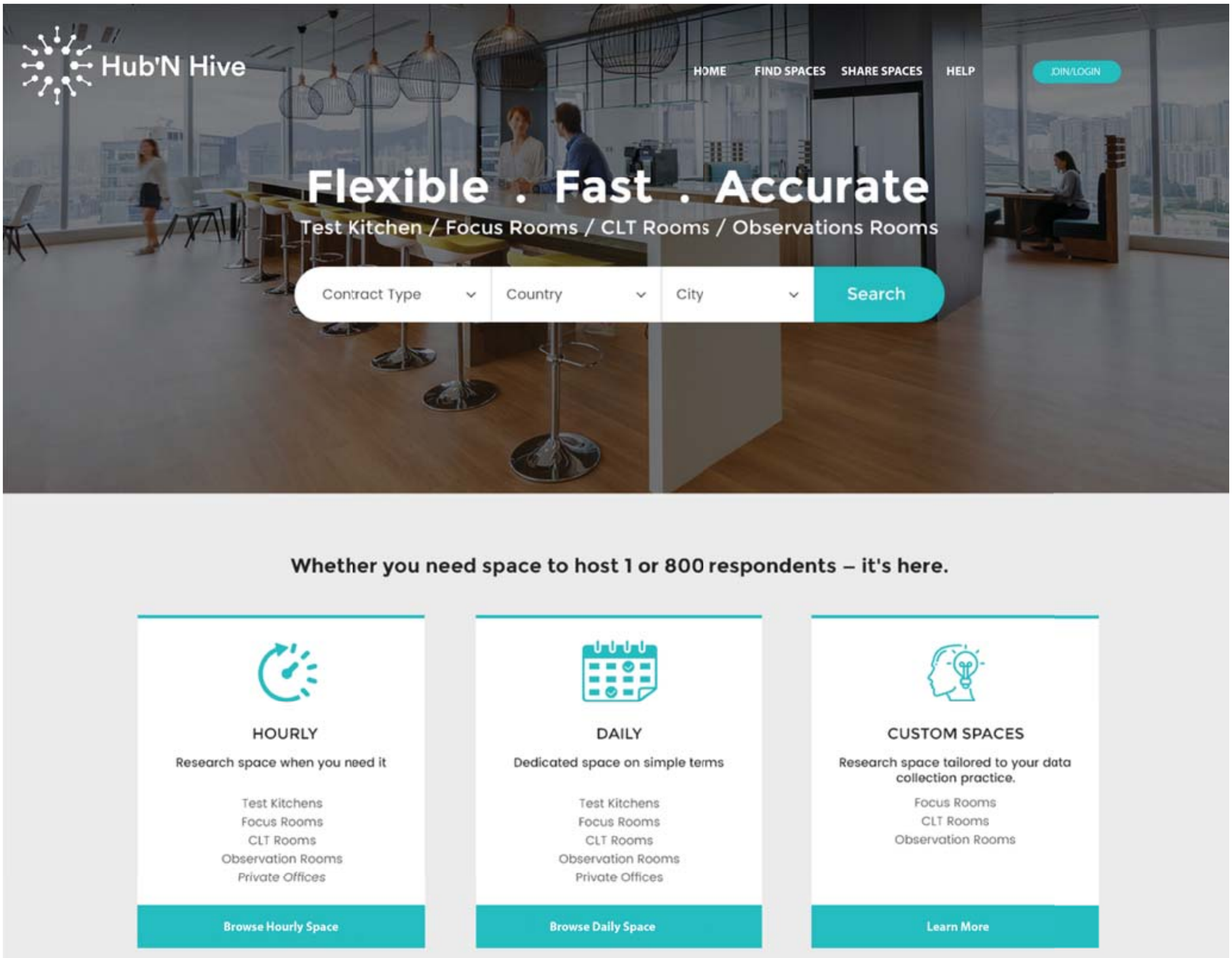
Connected with brand usage, this provides marketers and insights professionals with the input they need to adapt, fine-tune and perfect their strategic positioning.

Communication

Not only does the Glocalities Insights Solution give you easy access to insights about the profile of your target audience but it also shows you where to find and how to communicate and engage with your target audience more effectively. The Glocalities Insights Solution contains data that is updated annually. Furthermore, the Glocalities Data-Consultants can help you to analyze the database in an effective way that saves you both time and money.

Follow global industry leaders such as Unilever, Heineken and Greenpeace and niche players like Big Green Egg and the Dutch Van Gogh Museum by boosting the effect of your marketing and working with Glocalities insights today.

If you would like to learn more or get a demo, please visit our website: www.glocalities.com/world-of-glocalities/ or contact Pieter Paul Verheggen and/or Hans Schoemaker at 31-20-589-8383.



FACTS 'N FIGURES

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

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

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

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

www.factsnfiguresinc.com

Applying indirect sample frames

| By Ahmed Fouad

snapshot

Ahmed Fouad uses a B2B example to show how to employ indirect sample frames.

Determining the sampling type is a vital stage in the research process. It indicates the representation of the population and influences the analysis techniques to be employed. For instance, part of multivariate analysis requires probability sampling to be executed to meet the requirements for the analysis. Applying probability sampling in market research is not always applicable mainly due to the unavailability of the direct sample frame – a traditional sample frame, where the entire population is sorted in a specific database with contact information. Imagine, for example, an attitude and usage study targeting users and non-users of a specific product. It would be quite hard (or impossible) to find a database of your target respondents. In such cases, you will not be able to employ one of the probability sampling types, limiting analysis techniques and affecting the representation of the population.

In similar incidents (where the traditional sample frame is not available), the indirect sample frame can be employed instead. Indirect sample frames rely on geographic areas to segment and draw the sample randomly from each sub-area or segment using published directories.

Usually, countries are divided into sub-areas (e.g., country > region > governorates > districts > blocks). The names of sub-areas may be different from country to country but this classification usually illustrates the structure of a country (how it is segmented, the total number geographic areas and other relevant information). This kind of directory can be a replacement of the direct sample frame because it contains all sub-areas that you are targeting in your research for geographical coverage and it frames the sampling units of your research (target respondents).

But it is a bit different than the direct sample frame as it does not allow for direct selection and access on the respondent level. Instead you reach the respondent gradually by selecting the sub-areas on different levels based on the classification and segmentation of the geographical coverage (e.g., city and country) until you reach the respondent. How is the probability sampling drawn? Here are the three steps.

Determine the geographical coverage. This stage involves determining the research coverage – that is, the geographical areas to be covered in the research scope. It could be the whole country or specific regions or cities. This determination is required to drive the second step to find the requirements to prepare the relevant indirect sample frame.

Prepare the indirect sample frame and population structure. In this step, we are looking for a frame that explains the geographical structure (i.e., how it is segmented, the number of areas/sub-areas and the name of each area/sub-area) of the research coverage. This type of information and frame could be available in a published directory from governmental bodies (e.g., statistical authorities). Try to find the most updated and relevant one and zoom into your research coverage to understand how many levels the structure contains and then prepare a list including the

Table 1: Example of indirect sample frame

Municipality ID	Municipality Name	Population	Size	District ID	District Name	Population
001	ABC	30000	77%	0011	DF	10000
				0012	DD	5000
				0013	DO	15000
Total				3		30000
002	DEF	9000	23%	0021	MN	5000
				0021	MI	4000
Total		39000		2		9000

Table 2

Target city (city name)	AMF
Total population	39,000
Total number of municipalities	2
Total number of districts	5

following fields:

- the names of the upper geographic areas (upper areas or segments under the geographical coverage of the research; for example, municipalities or regions that include sub-areas)
- the identification code of the upper geographic area (a unique number) such as 001
- size of the first (for example, population, number of sub-areas included in this level)
- the names of the lower geographic areas (sub-areas of the upper areas; for example, districts or cities)
- the identification code of the second level
- size of the second (for example population, number of sub-areas included in this level)

The number of levels depends on the geographical coverage of the research and how it is structured, so you may have two or more levels. See Table 1 for an example.

The list in Table 1 will be treated as the indirect sample frame; it contains all of the sub-areas that frame the target respondents of your population.

Based on the indirect sample frame, you will be able to summarize the population structure as shown in Table 2.

Define the sampling technique and draw the sample. Here you will prepare the sampling design and procedures to be executed in the data collection stage. The area sampling will be applied (most probably multistage area sampling) where the sample defined across each geographic area of the population structure effectively represents the population.

The indirect sample frame in practice

In the following example, we will walk through a research project completed using the indirect sample frame to see how it can be executed.

The research was about testing a new concept with a B2B segment. The client provided the concept to be tested with the target respondents. Let's look at the sampling plan and procedures.

Determine the geographical coverage. Cost constraints limited the research to a single city in the country, so one of the main business cities was selected to be the geographical coverage for the study.

Prepare the indirect sample frame and population structure. We checked the published directory for the city to understand how it is structured and segmented geographically. It was determined that the city is divided into two main geographic units – municipalities – each of which is further divided into sub-areas called districts.

Table 3: Part of the sample frame

District names	District ID	Municipality names	Size
DS 1	1	MN 1	10%
DS 2	2		
DS 3	3		
DS 4	4		
DS 5	5		
DS 6	6		
DS 7	7		
DS 8	8		
TOTAL	8		
DS 1	9	MN 2	20%
DS 2	10		
DS 3	11		
DS 4	12		
TOTAL	4		
DS 1	13	MN 3	10%
TOTAL	1		
DS 1	14	MN 4	10%
DS 2	15		
DS 3	16		
DS 4	17		

Accordingly, the indirect sample frame was prepared. Table 3 shows part of the sample frame.

In summary, the population was structured as shown here.

Sub-area	Total number	Comments
Municipalities	12	Total number of townships in the city
Districts	95	Total number of districts distributed across the municipalities after excluding non-business districts (areas do not include administrative buildings and companies)

Define the sampling technique and draw the sample. The target audience was the managers working in the companies in different sectors within the city. The proposed sample was 100 interviews. Multi-stage area sampling was employed in three stages.

Stage 1: Primary sampling units
Using cluster sampling, six clusters were selected from the total municipalities in the city to represent the primary sampling units (PSU), the selection done on the basis of the availability of the number of companies and business buildings across the municipalities.

Stage 2: Secondary sampling units
In this stage, 10 districts were determined to be sampled. However, these 10 districts were distributed across the PSU using the probability proportional to size sampling. The size was the number of districts in each municipality. The district is treated as the secondary sampling unit (SSU).

Stage 3: Tertiary sampling units
Within the selected SSU, the companies were selected using the right-hand rule technique to select the street, building, floor and company (business buildings are commonly available in the targeted city) to be interviewed. This technique has been followed to ensure the randomization of the selection and remove the interviewer's bias. Figure 1 illustrates the sampling design.

Sample distribution and selection

Figure 1: Tertiary sampling units

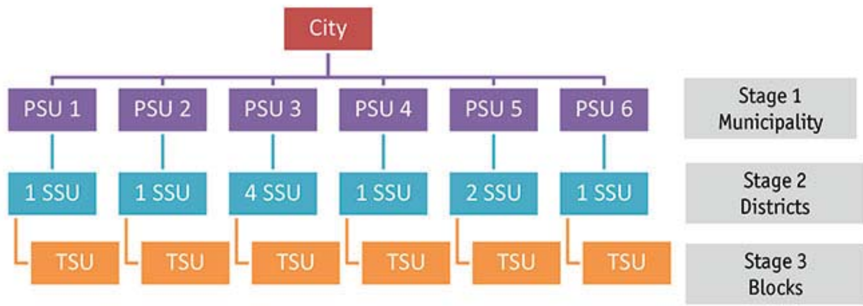


Table 4: Sample distribution and selection

Municipality names	Municipality size	No. of district to be sampled	Name of districts to be sampled	Sample size by municipality/ district	Sample split by municipality
Municipality 1	10%	1	District 2	10	10%
Municipality 2	10%	1	District 1	10	10%
Municipality 3	40%	4	District 1	10	40%
			District 3	10	
			District 5	10	
			District 6	10	
Municipality 4	10%	1	District 2	10	10%
Municipality 5	20%	2	District 3	10	20%
			District 2	10	
Municipality 6	10%	1	District 1	10	10%
TOTAL	100%	10	10	100	100%

The proportionate distribution technique was applied to split the total sample size on two main elements: business sector of the company and sample size by municipality. To apply the selection procedures, the indirect sample frame (the selected PSUs) has been uploaded into the statistical software and then simple random selection is applied on the municipality level to identify which district to be sampled and finally the sample size by municipality. Table 4 shows the sample file.

Wider range of analysis techniques

While employing the indirect sample frame involves multiple processes to be developed and executed, the effort is quite justifiable compared to the expected benefits. We will be able to boost the sample representation as the indirect sample frame lets us draw the probability sample in absence of the direct sample frame. Moreover, we have an increased opportunity to apply a wider range of advanced analysis techniques because the probability sampling satisfies part of the advanced analysis technique requirements. As result, we maintain a high level of reliability for the research results and the recommendations based on them.

Ahmed Fouad is senior research manager at electrical and electronics manufacturing firm El-Araby Group. He can be reached at m.ahmedfouad@gmail.com.

A short note on the Monty Hall problem

| By Stephen Hellebusch

snapshot

Stephen Hellebusch experiments with rolling the dice to avoid the goat.

Some readers may already be familiar with the Monty Hall problem but a brief description can't hurt. On the venerable TV game show Let's Make A Deal, the host, Monty Hall, would have three doors. Behind one was a valuable prize like a new car or a dream vacation. Behind each of the other two was a booby prize of some kind like a goat or an old junker. The contestant (you) was asked to pick a door. With no knowledge, it is a one-in-three chance you will pick the car. So, you pick Door 1 at random.

Then, Monty shows you that there is a goat behind Door 3 and asks if you want to switch from Door 1 to Door 2. Logically, it seems it shouldn't matter. Your odds are now

Table 1: Results of the Monty Hall problem thought experiment picking 1, 2, 3

Trial No.	Car is at door	My pick	Monty reveals goat	If I stay	If I change	Change result
1	2	1	3	1	2	W
2	2	2	1 or 3	2	3 or 1	L
3	2	3	1	3	2	W
4	3	1	2	1	3	W
5	1	2	3	2	1	W
6	2	3	1	3	2	W
7	3	1	2	1	3	W
8	3	2	1	2	3	W
9	1	3	2	3	1	W
10	2	1	3	1	2	W
11	3	2	1	2	3	W
12	1	3	2	3	1	W
13	2	1	3	1	2	W
14	3	2	1	2	3	W
15	2	3	1	3	2	W
16	2	1	3	1	2	W
17	3	2	1	2	3	W
18	2	3	1	3	2	W
19	1	1	2 or 3	1	3 or 2	L
20	3	2	1	2	3	W

Table 2: Results of the Monty Hall problem thought experiment always picking Door 1

Trial No.	Car is at door	My pick	Monty reveals goat	If I stay	If I change	Change result
1	2	1	3	1	2	W
2	2	1	3	1	2	W
3	2	1	3	1	2	W
4	3	1	2	1	3	W
5	1	1	2 or 3	1	3 or 2	L
6	2	1	3	1	2	W
7	3	1	2	1	3	W
8	3	1	2	1	3	W
9	1	1	2 or 3	1	3 or 2	L
10	2	1	3	1	2	W
11	3	1	2	1	3	W
12	1	1	2 or 3	1	3 or 2	L
13	2	1	3	1	2	W
14	3	1	2	1	3	W
15	2	1	3	1	2	W
16	2	1	3	1	2	W
17	3	1	2	1	3	W
18	2	1	3	1	2	W
19	1	1	2 or 3	1	3 or 2	L
20	3	1	2	1	3	W

50/50, so why not just stay with Door 1? Makes no difference.

Statistically that is wrong. Monty has just given you new information and it changes the odds. Given that there is a goat behind Door 3, your odds increase significantly if you switch to Door 2. Honestly, I have never understood completely why this is so. So, I decided to conduct a thought experiment and see for myself.

I took a die and rolled it 20 times. I thought I would start with 20 and see if any pattern emerged. If the die came up 1 or 4, the car was behind Door 1. If it came up 2 or 5, it was behind Door 2, and 3 or 6 was Door 3. Then, I did choices. For the first three trials I picked Door 1, 2, 3. Then, I just repeated that 1-2-3 pattern. It turned out to be amazingly unlucky in picking the right door on my first pick.

After that, I noted the door I would have if I stayed or if I switched and whether switching resulted in a win or a loss (Table 1).

Obviously, I won a lot more when I switched. I found this hard to believe (and still did not understand), so I did a variation. I kept the door the car was behind the same as in the set above, but I always picked Door 1.

Staying with my pick, I won two more times (Table 2) than I did in my first thought experiment!

If my first guess is wrong, the door Monty opens is severely restricted, which is why changing your pick works better. For example, if the car is behind Door 2 and I pick Door 3, Monty must open Door 1. He can't open Door 2 and show where the car is and he can't open my pick, Door 3, show a goat and then ask me if I want to change. If I stay with Door 3, I lose, but if I switch, I win.

If I happen to guess right the first time, I lose by switching. If the car is behind Door 2 and I pick Door 2, Monty can open either other door and if I switch, I lose. Since I will only be right a third of the time, my best bet is to switch. You win a third of the time if you stick with your first choice and two-thirds of the time if you change.

I understand why a little better now but it still defies common sense (in my opinion)!

Stephen Hellebusch is president of Hellebusch Research and Consulting. He can be reached at steve@hellrc.com.

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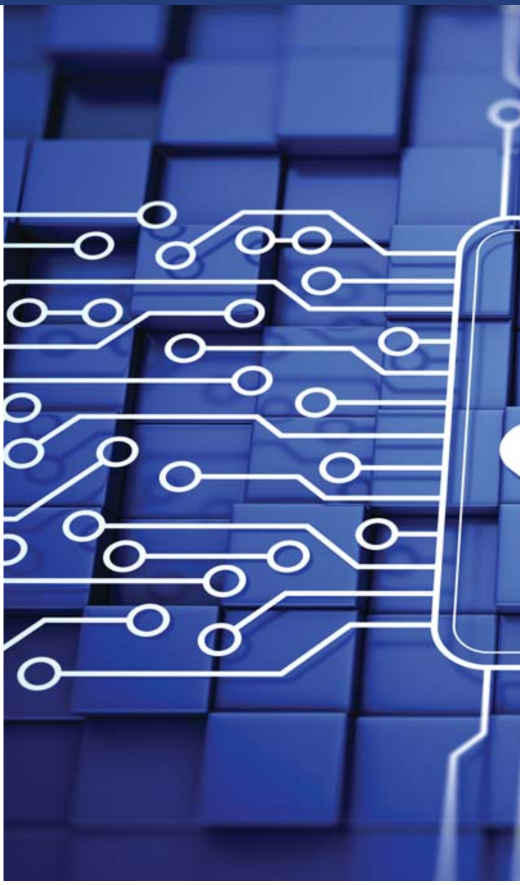
17 TOP ONLINE SURVEY RESEARCH COMPANIES



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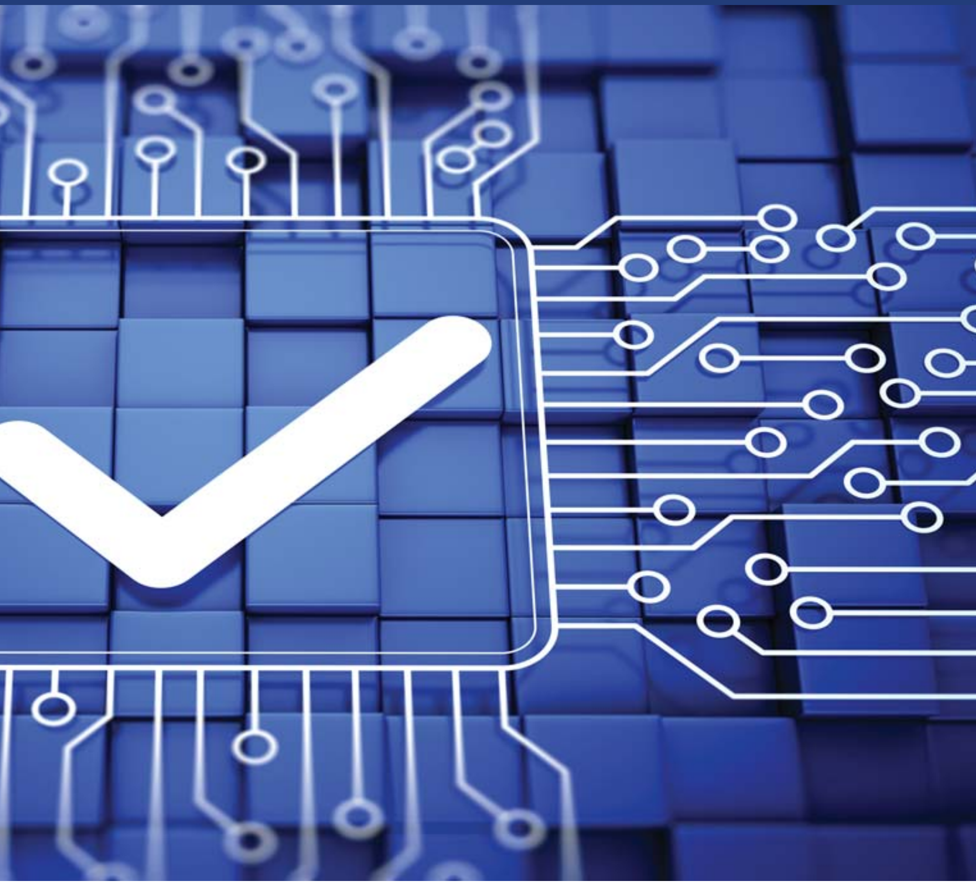

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Mayank Bhanushali, Founder and Managing Director

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Sam Pisani, Managing Partner
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Founded 2003 | 103 employees
Greg Matheson, Managing Partner
Joe Farrell, Managing Partner


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Founded 2019 | 308 employees
Vin DeRobertis, CEO, Americas
Sadia Corey, VP, Client Development


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Bryan Orme, CEO

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Play to your strengths

The 4 brand superpowers that enable the ultimate B2B customer experience

| By Simon Calvert

snapshot

How to get to what really matters when trying to create compelling customer experiences for B2B buyers.

Everyone knows that great B2B customer experiences are more important than ever. Research by Forrester, McKinsey, the Temkin Group and Rosetta – to name but a few – underscores the significant commercial benefits for businesses that have great B2B customer experiences.

But how many B2B brands go beyond knowing this and get to what really matters: identifying exactly what it takes to build great customer experiences for today's B2B buyers?

To uncover the key ingredients that matter when creating compelling customer experiences for today's B2B buyers, Merkle recently talked to 3,094 buyers of B2B products and services and got them to retrace their steps on their journeys for 5,622 recent B2B purchase experiences. They identified what mattered to them – and when it mattered. They scored the brands that featured on their journeys and how well they did against what mattered.

As a result, we were able to develop a deep understanding of what it takes to create compelling customer experiences for the B2B sector as a whole and specifically for four B2B verticals (financial services, manufacturing, professional services and technology). We also identified the B2B brands that do it well – and those that don't do it so well.

As a part of this analysis, we identified the 30 specific ingredients of superpowered customer experiences, along with the four superpowers that those create for B2B brands and the relative importance of them at different stages of a buyer's journey. Taken together, these insights:

- provide actionable intelligence and insight about what adds value to a B2B buyer's experience;
- identify the ingredients that have a significant influence on a B2B buyer's journey to purchase;
- provide an understanding of how customer experiences currently work in key categories;

• identify how specific brands perform against category benchmarks and against each other;
• enable marketers to focus resources on how to optimize against the category and step-change the category.

A few of the high-level key findings of this research – ones that B2B marketers must keep top of mind in crafting customer experiences – include the following:

The decision-making experience is long and slow for buyers. From initial research to final decision (via shortlisting and tendering), the process can take, on average, anywhere between 138 days to 417 days.

The experience is difficult for buyers. Depending on size of company and size of purchase, between 33 percent and 62 percent of buying experiences are at best mediocre and at worst disappointing.

Buyers are pretty ruthless along the way. They reject 62 percent of suppliers initially considered before the supplier is approached and invited to tender/quote.

Beyond these high-level insights, we uncovered what it takes to succeed in this challenging market. Below are our key findings. You can read the full report at https://cutt.ly/3j7jMGz (registration required).

Difference between success and failure

Superpowered customer experiences are the difference between success and failure for B2B brands. According to our analysis, the B2B brands that buyers consistently chose outperformed their competitors in four superpowered areas: reliability, understanding, enrichment and preeminence. These four superpowers are made up of the specific ingredients of a customer experience that demonstrate that a B2B brand can add significant value to the business that the buyer works for or to the buyer themselves.

- *Reliability*. This superpower demonstrates that a B2B brand can add value to the buyers' businesses. As part of a B2B customer experience it shows potential buyers that it can be trusted to deliver for their business. A reliability experience is characterized by ingredients such as the ability to deliver on time, take steps to mitigate risks and comply with regulations.
- *Understanding*. This superpower also demonstrates that a B2B brand can add value to the buyers' businesses. It shows potential buyers that this is a brand that gets what their business needs. An understanding experience is characterized by ingredients such as the ability to offer enough variety and choice, be approachable and transparent and be quick to respond to changing needs.
- *Enrichment*. This superpower demonstrates that a B2B brand can add value to the buyer themselves. As part of a B2B customer experience, it shows potential buyers that it can make their work life a little better. An enrichment experience is characterized by ingredients such as the ability to be easy to sell on, teach new skills and make a buyer's workday a little more fun/interesting.
- *Preeminence*. This superpower also demonstrates that a B2B brand can add value to the buyer themselves. It shows potential buyers that this is a brand that you would be proud to work with. An experience of preeminence is characterized by ingredients such as the ability to be an active thought leader in a category, a source of inspiration in the wider business world and have a progressive approach to stakeholders.

Two of these superpowers – reliability and preeminence – most positively improve a brand's chances of success at every stage of a buyer's journey. Whether a buyer is on a 138-day journey or a 417-day one, reliability and preeminence are critical to success. For example, an experience that contains ingredients such as the ability to meet a company's minimum quality needs, comply with regulations, take steps to mitigate risks, be an active thought leader and fulfill obligations to society are significantly influential at every stage of the purchase journey.

The two other superpowers – understanding and enrichment – play significant roles in the closing stages of a buyer's journey. This is particularly true at the stage of being approached to tender/quote and the final choice stage of a buyer's journey. Here, experiences that contain the following ingredients play significant roles for winning brands: the ability to provide support and information; to be approachable; to be transparent; to help make buyers more employable; and to make buyers' work lives more enjoyable.

Could do better

Some B2B brands have superpowered customer experiences. Many could do better. We explored and evaluated 5,622 recent B2B purchase experiences across four industry verticals: technology, professional services, manufacturing and financial services. We asked our 3,094 buyers to rate the brands they experienced based on those that did well (had superpowered customer experiences), those that could do better and those that struggled.

Here a breakdown of what we found drives success in our four industry verticals:

Technology. Success in the technology category is currently driven by the reliability and understanding superpowers. Microsoft, IBM, Dell, Verizon, AT&T and Huawei are examples of brands that our B2B buyers deemed to have superpowered customer experiences. (Google, HP and BT come close.) Enrichment plays a strong role when buyers are looking to make the final decision following the tender/quote stage and when buyers are looking to repeat purchase with a brand. In both situations, they are looking for brand experiences that make people feel safe contracting a brand, make their work life more enjoyable and teach them new skills.

Financial services. Like the technology category, success in financial services is currently driven by the reliability and understanding superpowers. Our B2B buyers deemed PayPal, Bank of China, American Express, Capital One and Commonwealth Bank to have superpowered customer experiences. (Bank of America, Barclays and Starling come close.) Enrichment plays a strong role when buyers are looking to make the final decision following the tender/quote stage – specifically, making people feel safe and being easy to sell on. Preeminence plays a strong role when buyers are looking to repeat purchase. Specifically, they are looking for thought leaders in the category and a progressive approach to stakeholders.

Manufacturing. Success in the manufacturing category is currently driven by all four of the superpowers. Our B2B buyers deemed 3M and DeWalt to have superpowered customer experiences. (Caterpillar comes close.) Again, reliability and understanding are important but enrichment and preeminence play significant roles earlier on in the decision-making process. Here buyers are looking for brand experiences that make people feel safe, are easy to sell on, are thought leaders in their category and have a clear vision of their obligations to society.

Professional services. Like the manufacturing category, success in the professional services category is currently driven by all four of the superpowers. However, despite all of the usual global suspects being explored and evaluated, our B2B buyers did not deem any of them to have a superpowered customer experience. (KPMG comes close.) The category performed best for reliability but did not do so well for understanding, enrichment and preeminence. Specifically, there was an absence of brand experiences in the professional services category that were approachable and transparent, made work enjoyable, were thought leaders in their category, had a clear vision of their obligations to society and were leaders in innovative products and services.

Notably, clear differences exist in what different-sized businesses value in B2B companies. In comparison to enterprises, SME buyers are more likely to value B2B customer experiences that have a smoothly integrated offering, aren't too complicated, can be customized and keep them up-to-date and employable. In short, they are more likely to value experiences that deliver more of the understanding and enrichment superpowers. On the other hand, enterprise buyers are more likely to value B2B customer experiences that can adapt to change, demonstrate leadership in innovative products and services and have a progressive approach to stakeholders. In short, they are more likely to value experiences that deliver more of the preeminence superpower.

In addition, clear differences also exist between the different generations of B2B buyers and what they value. Reliability, understanding, enrichment and preeminence are important to all but they play out differently across the generations. In comparison to the Boomer generation, Millennials are more likely to value B2B customer experiences that increase revenue, provide support and information, make work more enjoyable and have a clear vision of their obligations to society. On the other hand, Boomers are more likely to value B2B customer experiences that help grow their personal network and are a source of inspiration in the wider business world. In comparison to the other two, Generation X are more likely to value B2B customer experiences that teach them new skills and demonstrate thought leadership in category.
Regardless of industry, company size or buyer generation, one thing is clear for B2B companies: Creating compelling customer experiences is now more challenging than ever for B2B marketers.

Our research underscores the fact that there are no silver bullets – and that every B2B brand is a collection of impressions built up over time and several moments of truth. The challenge is that B2B brands either deliver in these moments and live on or they fall by the wayside. Creating good customer experiences is now more challenging than ever because:

- Marketers must deliver against expectations inflation. B2B customers are demanding more value from the brands with which they do business.
- Marketers must tame complexity – the never-ending explosion of touchpoints, platforms, data and technologies to work with.
- Marketers must succeed with finite resources – so many more things to do with less budget to do each one.

Creating the experiences that matter

Today's B2B brands must focus on creating the experiences that matter with the people who matter the most. Doing this successfully starts with an understanding of the ingredients of superpowered customer experiences, the superpowers that create them for B2B brands and their relative importance at different stages of a buyer's journey.

The four superpowers identified above demonstrate that B2B businesses need to go well beyond just trying to add value to businesses through the reliability and understanding superpowers. B2B marketers should also use the enrichment and preeminence superpowers for the buyers who work for those businesses.

There are huge opportunities for B2B brands to leverage these superpowers to differentiate themselves. In fact, most B2B brands are either underperforming or not performing at all when it comes to reliability, understanding, enrichment and preeminence. To get started, we recommend the following:

Discovery: Review how your brand and competitors perform against the four superpowers.

Analysis: Identify the gaps between your brand and success in the category.

Evidence: Conduct a survey to establish the full, unvarnished picture.

Optimize: Close the gaps. Deliver improvements on what buyers currently deem to be important in the category.

Step-change: Revisit the "empty spaces" – the remaining value-add ingredients that buyers currently don't deem important but could be made meaningful to them and differentiating for your B2B brand.

Simon Calvert is chief strategy officer at B2B International, a Merkle Company. He can be reached at simon.calvert@gyro.com.

•••b2b research

More help needed

Global survey finds B2B firms optimistic but lacking marketing and PR support

| By Simon Woolley

snapshot

Against the backdrops of COVID-19 and Brexit, companies are questioning the ROI and cost of PR agencies.

The COVID-19 pandemic has been a period of immense disruption for organizations across the globe and across almost every industry. And as we enter the new year, organizations face another challenge as the U.K., the world's fifth largest economy, leaves the EU.

The outlook forecast by industry experts[1], put simply, is quite bleak. Those organizations emerging from the pandemic disruption seemingly unaffected are predicted to be heavily impacted by the effects of Brexit.

As a result, IBA International conducted primary research[2] using Cint, a market research technology company, to discern if the pessimistic industry predictions reflected the reality that B2B organizations were facing. We surveyed 450 verified executive B2B marketing managers from the U.K., U.S., Australia and New Zealand (ANZ) to investigate the impact COVID-19 has had on their organizations and how they plan to tackle the upcoming year in the wake of lockdown and in the advent of the post-Brexit era.

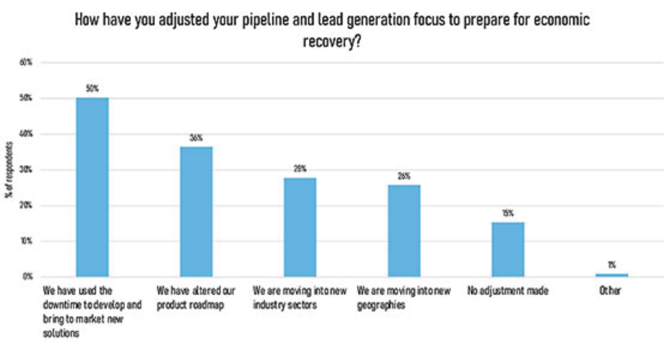
The results suggest a far more positive outlook for the future.

Take advantage of new opportunities

Despite causing business disruption, B2B organizations have been using the COVID-induced downtime to assess their pipelines and to take advantage of new opportunities. When asked how they have prepared their pipeline and lead-generation plans for economic recovery, only 15% of respondents said that they had made no changes. The vast majority (86%) of organizations said they had used the time to bring to market new solutions or to alter their product roadmap.

Organizations also indicated that expansion into new industries and geographies was a part of their recovery plan; 28% and 26% of respondents said they planned to move into new industry sectors and geographies in the future, respectively.

Figure 1



When asked about plans for international expansion related to Brexit, the results show an optimistic outlook from organizations across all geographies. For countries outside the U.K. looking to take advantage of post-Brexit trade deals, organizations in Australia and New Zealand were more open to trading with the U.K. than their U.S. counterparts.

When asked what conditions would encourage them to do business with U.K. organizations post-Brexit, 27% of U.S. businesses said they were not looking to trade with the U.K. compared to only 20% of organizations in Australia and New Zealand. However, a higher percentage of U.S. organizations (17%) claimed that they already export to the U.K. than organizations in Australia and New Zealand (10%).

U.K. organizations were also keen to explore international trading opportunities post-Brexit, with only 17% saying that they were not open to trading outside the U.K. and just under a quarter (23%) reporting they were only looking to trade within the EU.

When asked to expand on their motivations behind international expansion in the wake of Brexit trade negotiations, favorable trade agreements were the biggest pull towards international trade. In fact, 38% of ANZ organizations and 32% of U.S. organizations said that favorable trade agreements between the U.K. and their country would be a top reason to trade with the U.K. Similarly, low tariffs on goods and services within the U.K. would encourage 29% and 23% of organizations in Australia and New Zealand and the U.S., respectively, to export to the U.K.

For U.K. organizations, trade relations with the EU post-Brexit were flagged as a determining factor for exporting further afield. When asked what conditions would encourage them to explore new geographical locations for business ventures, over half (59%) and over a quarter (26%) of U.K. organizations said that favorable trade agreements with countries outside the EU and high tariffs on selling goods and services within the EU, respectively, would be key considerations when contemplating expansion outside of Europe.

Stands in the way of growth

But despite the majority of respondents (54%) demonstrating a desire to explore expansions in new geographies or industries, a lack of international PR and marketing experience stands in the way of growth plans.

For 40% of respondents, insufficient marketing budget was the obvious roadblock for international campaigns. But a more common challenge was a lack of media knowledge and experience. A combined 55% of marketing managers reported a lack of local media knowledge in the geographies they intended to penetrate and little brand or product knowledge for their new intended geographies. PR and marketing agencies will then be crucial to successfully support these expansions.

When asked how much they spend per month on PR and marketing agency support,

Figure 2

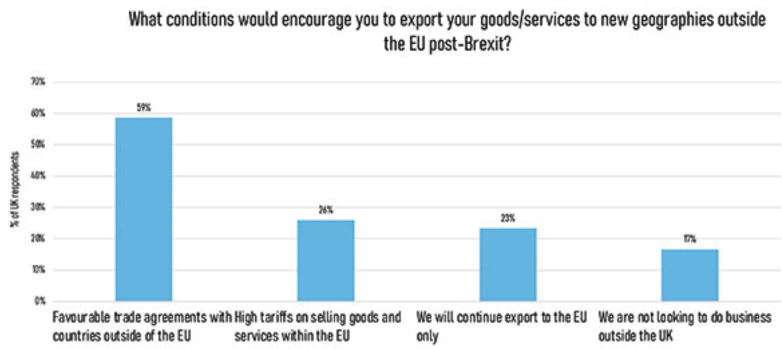


Figure 3

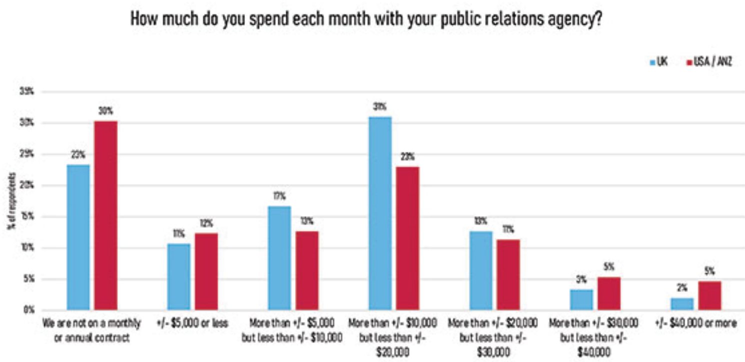
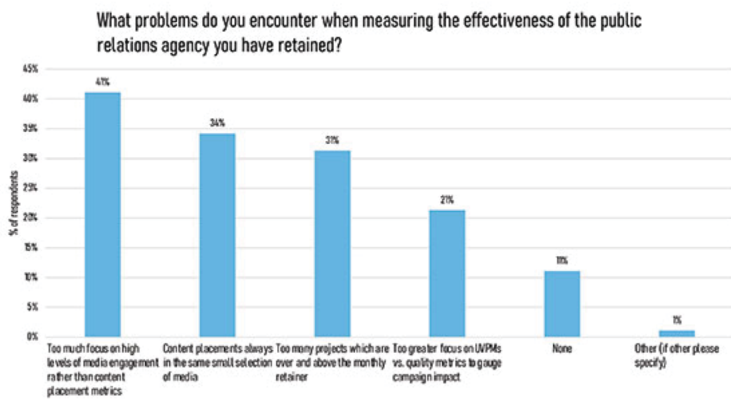


Figure 4



over a quarter (26%) of B2B organizations in the U.S. and Australia and New Zealand revealed that they spend between $5,000 and $15,000 per month on PR agency fees per month and 36% of B2B organizations in the U.K. spend between £5,000 and £15,000 per month on agency fees. One notable difference indicates that U.S. and ANZ businesses were more likely than their U.K. counterparts to spend more on PR agency fees. Five percent of U.S. and ANZ organizations spend over $40,000 per month on PR agency fees compared just to 2% of U.K. organizations.

But COVID-19 has exacerbated existing pressure for budget cuts, so a focus on value for money is driving current PR and marketing campaigns, especially within B2B organizations. Following the pandemic outbreak, the research found that a staggering 45% of B2B organizations from U.S., ANZ and the U.K. have cut public relations spending in response to the pandemic. The pandemic had the biggest effect on the budgets of U.K. marketing managers as over half (54%) of surveyed managers admitted to either having cut or eliminated their PR spend as a result of the COVID-19 pandemic, compared to 51% in the U.S. and 50% in ANZ.

Value is a priority

With budget cuts a reality for over half of marketing managers across all regions, value for money is a priority but only 11% of B2B marketing managers across U.K., U.S. and ANZ claim that they do not encounter any problems when measuring the effectiveness of their PR agency. Nearly half (40%) of marketing managers admit they find it difficult to measure the contribution of their PR and marketing agency to the overall business.

When probed further about the reasons for their dissatisfaction, a lack of value for money and clear measurable results from their incumbent agency were among the main reasons for criticism from marketing managers. The research found that 41% of marketing managers feel that their public relations agency put too much focus on high levels of media engagement over content placement metrics. In addition, 34% feel their public relations agency is ineffectual as they place their content in the same small selection of media.

As well as not being able to demonstrate clear, measurable results, 38% of marketing managers reported that a lack of affordable agencies that could work in a number of countries has impacted their success in internationally expanding PR and marketing campaigns.

Not a good fit

Over half of B2B marketing managers believe public relations agency fees are too high, with 30% suggesting that the cost outstrips the return and a further 21% highlighting that they feel pushed by senior management to go with well-known agencies that are too expensive and not a good fit for their business.

The high costs associated with PR and marketing agencies do not, as the research found, align with the results that marketing managers are seeing and budget pressures. Just 27% of U.K., U.S. and ANZ marketing managers said they were very

Figure 5

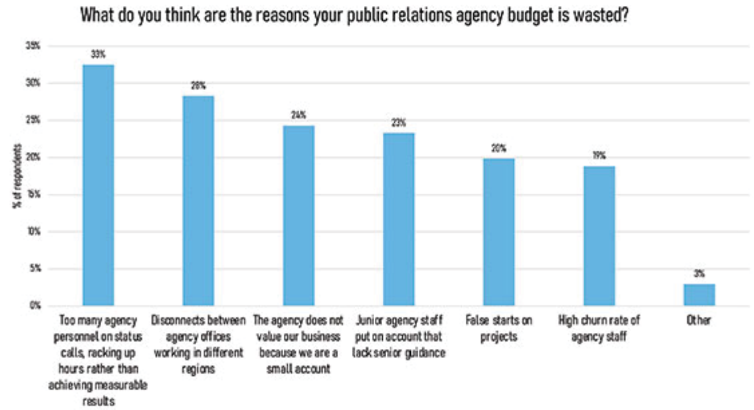
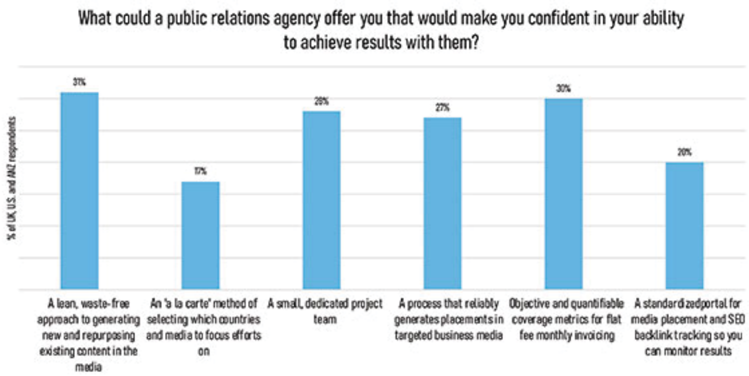


Figure 6



satisfied with the value they receive from their public relations agencies. U.K. and ANZ marketing managers were less satisfied with the value they receive from their PR and marketing agencies than their U.S. counterparts, with just under a quarter of U.K. and ANZ marketing managers (20% and 24%, respectively) saying they were very satisfied with the value their PR agency was delivering in comparison to 30% of U.S. marketing managers.

Up to 50% of budget wasted

The lack of satisfaction that marketing managers get from their PR and marketing agencies corresponds to the amount of their monthly budget that they think is wasted. Only 10% of organizations felt that none of their budget was wasted, with the majority (85%) of organizations stating they believed up to 50% of their budget was wasted. Organizations in Australia and New Zealand were most likely to report they felt their budget was wasted, with a huge 75% claiming they felt at least 10% of their budget was wasted. The report found that 9% of marketing managers in Australia and New Zealand felt that more than half of their budget was wasted.

When asked where their budgets were wasted, a third of marketing managers felt that agency staff spent more time on status calls than achieving actual results. Additionally, 28% accounted a disconnect between regional agency offices as a reason for wasted budget.

Criticism was also directed towards the agency staffing structures. Almost a quarter (23%) of marketing managers reported budget wastes when junior staff are put on accounts that lack senior leadership and a further 19% felt high staff churn contributed budget waste. Twenty percent claimed false project starts were a factor in budget waste and almost a quarter (24%) said budget waste stemmed from being undervalued by agencies that did not value their business as a smaller client.

New approach needed

With wasted budgets, low satisfaction with current agency support – and more importantly, with marketing managers receiving limited value – a new approach is needed to ensure ambitious marketing plans can be achieved during economic recovery.

While marketing managers were asked to share their criticisms, they were also asked where they would like to see improvements in their PR agency support to ensure that they can effectively expand their PR and marketing campaigns to seize the expansion opportunities presented during economic recovery. Nearly a third (31%) of marketing managers across all regions said they would like a lean, waste-free approach to generating new and repurposing existing content in the media and a further 30% claimed that objective and quantifiable coverage metrics for flat-fee monthly invoicing would make them confident in their ability to achieve results with their PR agency. Over a quarter (28%) of marketing managers said they would like a small and dedicated team to support them and a further 27% opted for a process that reliably generates placements in targeted business media.

Adapt to their needs

The future is shrouded in uncertainty as an end-date for lockdowns around the world remains unknown. But this primary research demonstrates that B2B organizations have adapted to the new norm and now look to the future with optimism, whether lockdowns are lifted or not. The desire to expand business into new industries and geographies to capitalize on COVID- and Brexit-induced market changes is evident but the lack of value provided by traditional agencies means a new PR model needs to be adopted to support expansion plans. B2B marketing managers are seeking more results-driven and affordable options and PR agencies should adapt to their needs.

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••• ad research

Plotting the powerful pathways

The value of mapping brand memories

| By Charles Young, Eldaa Daly and Russ Turpin

snapshot

Using an Oreo cookie example, the authors outline an approach to visualizing how ads bolster consumers' emotional connections to brands.

At the dawn of the internet age, when IBM was spending $500 million a year on global advertising to prepare the way for e-commerce, it fired its 40 advertising agencies and consolidated all of its creative work in one agency, Ogilvy. The reason? So IBM would speak with "one voice" around the world. The result was the famous "Blue Letterbox" campaign.

It was a dramatic commitment to the idea of integrated market communications.

What IBM recognized, and many good marketers know, is that when ads work in concert they can leverage existing brand awareness and perceptions and yield increased value. This is why marketers invest in creating a common look and feel across advertising and communication, with standardized fonts, color palettes, logos, trade characters, celebrity spokespersons and other recurring executional elements. The resulting synergies have the potential for long-lasting returns for the advertising investment.

However, in today's era of multichannel advertising and microtargeting, it can be more challenging than ever for a brand to effectively communicate a unified, integrated strategy. With a confusing array of media options available, marketers need a more complete approach to understanding the effectiveness of multifaceted advertising. And yet most creative pre-testing is done at the level of individual ads. The question for ad researchers, therefore, is how do we understand and measure, particularly in advance, how multiple ads work together to build a brand?

The answer lies in looking where it all comes together, inside the head of the consumer.

Somehow link back

Brand fit is a branding measure frequently used in pre-testing and tracking. It's a simple rating that has been highly validated to in-market sales results. But what do we mean by the concept of fit? Fit implies that the ideas, images and emotions created by new advertising somehow link

back to an existing network of brand associations. These associations are the connected memories that form the idea of a brand in the mind of the consumer. The term fit further suggests that there is shape and structure to this memory network; new memories created by new advertising fit like puzzle pieces into the existing pattern of brand associations, images and feelings.

The existing network of brand memories anchors the brand positioning. However, to keep a brand relevant to ever-changing culture it needs to be continuously nourished with fresh, emotion-charged imagery from new creative. In essence, new ads should add growth rings to the brand tree rooted and growing in memory. That is the creative tension that exists between a brand's positioning and a brand's image, between messaging and emotional experience.

From the standpoint of creative content, each new execution can nourish the brand tree in two ways. Like the concepts of frequency and reach in media planning, an ad can either add depth or it can widen the breadth of a brand's appeal. An ad can increase a brand's depth by reinforcing or strengthening current perceptions and emotions among existing customers, thereby reinforcing or strengthening their loyalty; whereas expanding breadth means appealing to new consumer segments with different

Figure 1: Memory triangle

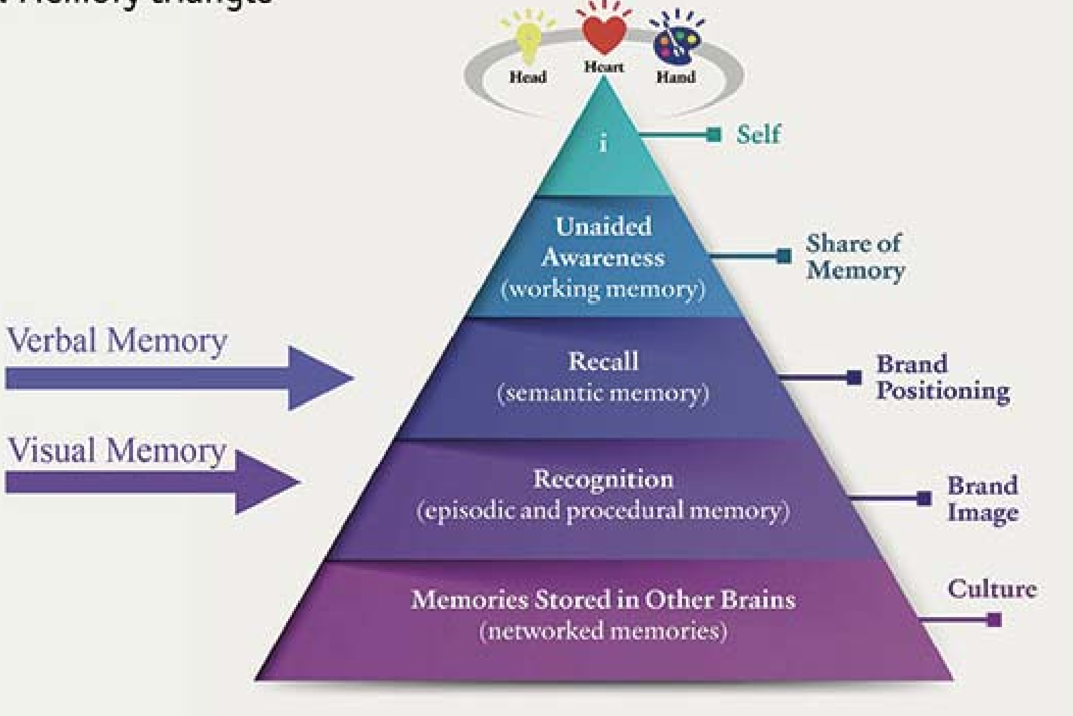


Figure 2a: Semantic net (pre)

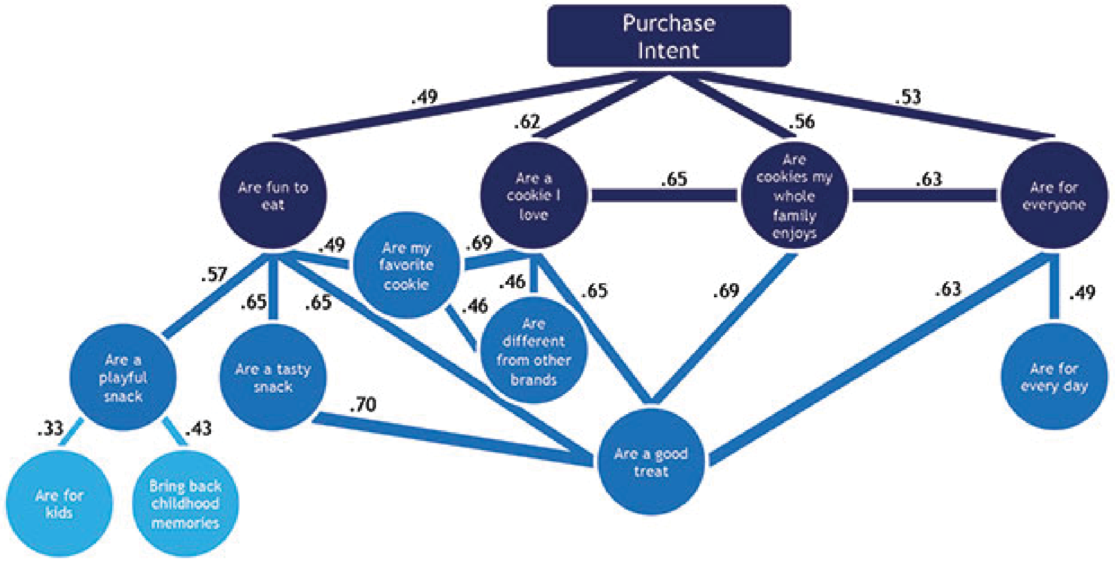
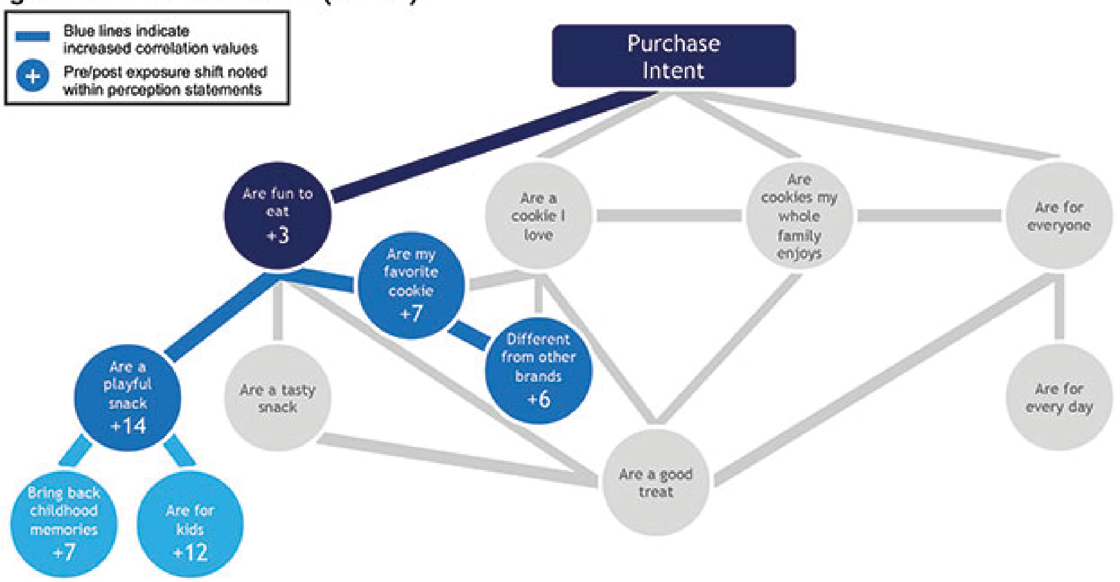


Figure 2b: Semantic net (shifts)



executions.

Layers of memory

Because brands actually exist in consumers' memories, it's helpful to have a general understanding of the different layers of memory operating in the consumer's mind (see Figure 1).

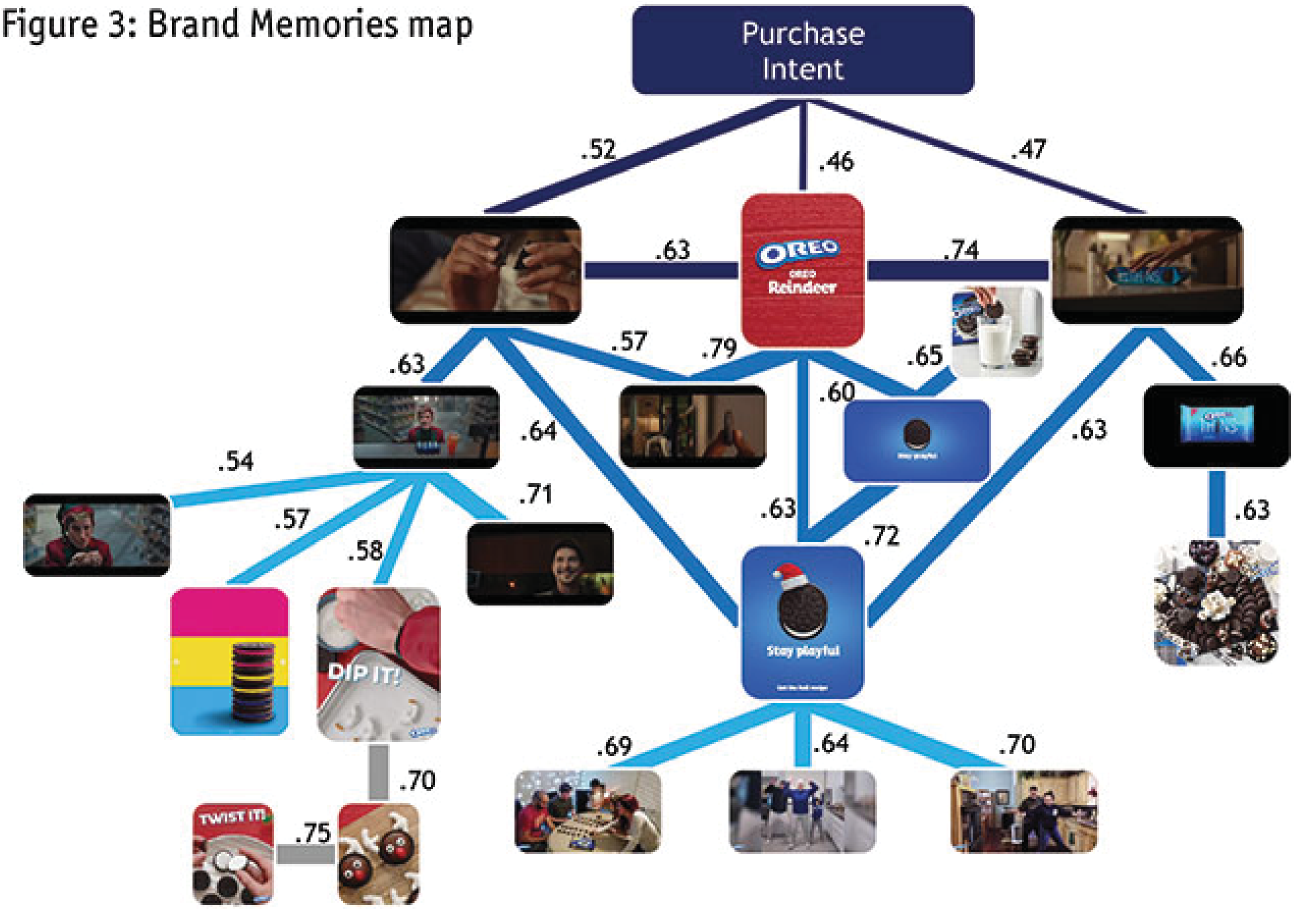
At the top is working memory. Working memory determines how your conscious mind continuously perceives and understands the world. Brands that are easily retrieved or are available to working memory in a product category are the ones most likely to be in that consumer's purchase consideration set. Brands that come to mind first or spontaneously are default purchase choices – they are on the consumer's mental shortlist.

Classical measures of working memory from tracking studies, such as top-of-mind awareness (for category leaders) and unaided awareness (for established brands), have been validated over and over again as highly correlated with short-term sales results and are good month-by-month measures of how well a brand's advertising is doing this job.

The next level down is the semantic memory system where verbal concepts and thought categories are stored. A brand's positioning, which is the memory of how a brand is conceptually different from or similar to competitors, resides in semantic memory. Semantic memory is the realm of strategic ideas, of features and benefits, unique selling propositions and rational value calculations. For a brand, these perceptions are measured easily with brand ratings and scales.

Episodic and procedural memory are the two non-verbal memory systems on the next level. These systems store our social and physical experiences and their associated emotions and sensations. This is the level of a brand's image. Hard-headed businesspeople sometimes consider this to be the "soft" side of a brand – but that's because the contents of non-verbal memory are more difficult to measure or quantify –

Figure 3: Brand Memories map



until now.

The episodic memory system is our storytelling brain. It stores the emotions linked to the long-term memories of our life stories. This helps us navigate the complex social world by providing emotional cues that let us know who to trust, who to aspire to be like or how to behave in different social situations. Episodic memories tied to a brand can mean a brand generates a pleasant feeling such as childhood memories or nostalgia or fun or a feeling of luxury or hipness.

The procedural system stores our physical memories, helping us navigate the physical world. The cool sensation of a York Peppermint Patty that you can associate with the image in an ad is stored in procedural memory. Procedural memory is the level at which dance, design and music operate.

And at the bottom level of memory are our networked memories – the human "cloud." These are memories that we share with others, those that bind us together into a common culture. Advertising exists in context, such as the cultural context in which it's placed. Understanding how a brand fits within the cultural memories associated with specific media, such as popular TV shows, can help media companies more effectively place advertising.

Brand memory maps

In order to explore how brand memories are networked together, at both the verbal level of brand positioning and the non-verbal level of brand image, we are introducing a research method called brand memory maps.

These maps can be constructed with a simple, algorithmic process that can be done by any ad researcher on an Excel spreadsheet – with a little creativity added for the intuitive display of visual data. (Details on how to construct these memory networks can be found in Chapter 13 from The Advertising Research Handbook, which can be downloaded for free at www.ameritest.com.)

Brand memory maps are useful for identifying:

- the key conceptual nodes that anchor the motivating core of a brand's positioning;
- the key selling pathways for differentiating the brand's positioning, for use in creative strategy development;
- the most salient advertising images that drive top-of-mind and unaided brand awareness, helping develop attention-getting executions that drive short-term sales;
- the attachment nodes – brand-linked memories or "advertising equities" – images that recur across different executions that are key for fitting new creative experiences into the existing memory network that represents the brand in the mind of the consumer;
- the branches of the memory network that are better, or less well-developed, for different target consumer segment;
- how memories created by an ad are linked to the memories created by the media it's embedded in.

Mapping verbal memory

Researchers can map semantic perceptions of the brand across ideas operating in its category with verbal brand ratings scores and correlating these with purchase intent. In the graphic representation (which you can see in Figures 2a and b), purchase intent is the node at the top of the map. Brand

Figure 4a: Memory Map (playful)

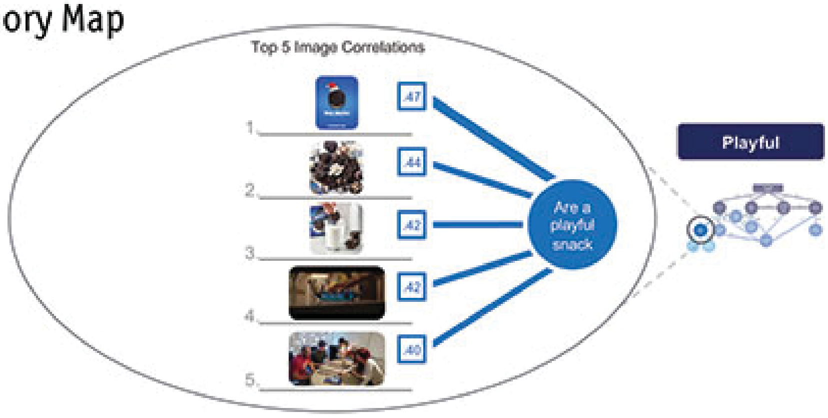
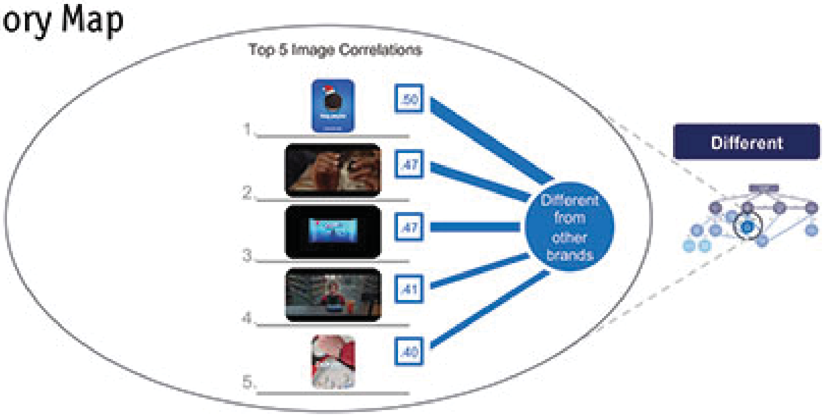


Figure 4b: Memory Map (different)



perceptions are the other nodes. Lines connect the nodes based on the correlations between these verbal ideas, representing the distance between these ideas in the mind. Each node's position and the line's thickness are dictated by the strength of the correlations. Perceptions highly correlated with motivation will be closer to purchase intent and will have thicker lines. Those with weaker correlations will be further away and the lines will be thinner.

When you look at the entire semantic net, you can literally see how consumers think about your brand and how these ideas are networked together for different selling propositions. This can be used to design communication strategies that have a clear entry point to existing perceptions and a path to purchase intent.

Mapping visual memory

Maps of visual memory networks are constructed from the same iterative, mathematical process as used for mapping semantic memory networks, only it is done with picture-based measures rather than verbal rating statements. Using individual pictures from advertising, visual memory networks can be constructed from consumers' response to the pictures in terms of memorability, emotion and brand fit. Images replace the verbal nodes and a composite of image memorability/emotional response scores is used for correlations, which represent the emotional distance between images in memory. The result is a visual memory map (Figure 3).

This map shows how a brand's advertising imagery is linked together in associative memory. It provides a picture of the non-verbal domain of episodic and procedural memory, which is where brand emotions are stored.

Combining these two maps, the verbal and the non-verbal, brand positioning and brand image, gives the marketing team a more balanced – and quantified – view of how advertising builds a brand in consumer memory.

Case study: Oreo cookies

(Note: the data for this study was collected for educational purposes and was not commissioned by the Oreo brand.)

As Christmas approached at the end of last year, we used our standard campaign testing methodology to measure the impact of a group of eight Oreo ads from TV, Facebook and Instagram, from several overlapping Oreo campaigns. We conducted an online survey of 500 consumers who each saw all eight ads (in randomized order). Respondents then answered a series of verbal questions about the Oreo brand and each of the eight executions. This data was used to collect the verbal memory maps. Next, respondents sorted through a randomized subset of 78 still images taken from all the ads – on the three dimensions of memorability, emotion and fit with the brand. This image data was used to build the visual memory map.

Breadth and depth of appeal

In terms of the collective impact of the ads, the breadth of appeal of these eight ads – that is, the percentage of consumers motivated by any of the ads – was 64% on the basis of top-box purchase intent. In terms of depth of appeal, the average number of ads respondents found motivating was 2.6 out of the eight ads.

From this we concluded that the marketing effect of this group of ads was to increase the mental availability of the brand across a large number of consumer segments, keeping Oreos top-of-mind and not to deepen the brand preference during any particular target segment.

Figure 4c: Memory Map (milk dunk)

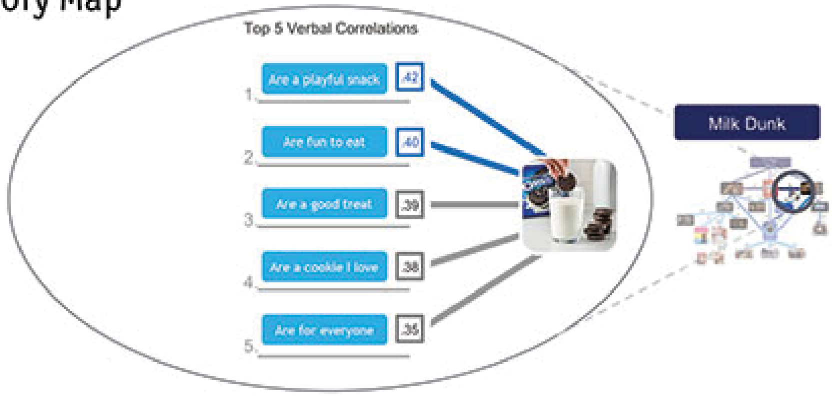
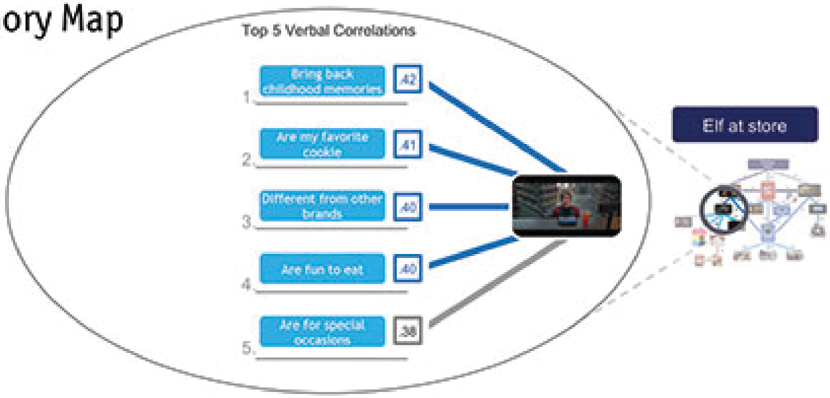


Figure 4d: Memory Map (elf)



Reinforcing brand positioning

The semantic memory network shown in Figure 2a is based on measures collected before consumers saw the ads and is the baseline. The numbers next to the lines are the correlations between conceptual categories.

From this we see that the key verbal concepts anchoring the Oreo brand positioning – those ideas most correlated with purchase intent – are: fun to eat; a cookie I love; cookies my whole family enjoys; for everyone.

Generally, in analyzing brand semantic nets for a product category, ideas closest to purchase intent are cost-of-entry benefits for the category. The perceptions connected to these, on the perimeter of the map, tend to be the brand differentiators. But on the Oreos map, the ideas of "fun" and "love" are primary drivers of purchase intent, which tells us that consumers buy Oreo cookies for emotional, rather than rational reasons.

Another important insight comes from the close association between "fun" and "playful," which makes these two ideas appear synonymous. But this is not the case. Though the two perceptions are closely correlated, on pre-measures 52% of cookie eaters rate Oreos as fun, while only 39% rate them as playful before seeing these ads.

The semantic network in Figure 2b shows how these ideas shifted in memory after consumers saw the ads. The numbers shown are pre-post increases in brand ratings. The increase in Oreos as a "playful snack" shows how well the ads work together to communicate the idea of playfulness. Because playful and fun are closely linked, the playful messaging of these eight ads increases motivation among consumers who find Oreos fun, resulting in a stronger correlation between fun and purchase intent. Thus, we conclude that collectively these eight ads reinforce the path-to-purchase between playful and purchase intent.

Refreshing the brand image

As we move from the head (semantic memory) to the heart (episodic memory) and hand (procedural memory), we move into the two memory systems where the emotions and physical sensations associated with a brand are stored. This is the realm of execution, not strategy; of brand image, not brand positioning.

Across the entire set of 78 images, 53% of respondents say the images "fit the way I already think and feel about Oreos," while 28% of respondents say the images "gave me a new idea or feeling toward Oreos and I can see how they fit Oreos." In other words, the images stretched roughly a quarter of consumers' thoughts and feelings about the brand in a meaningful way, adding a new growth ring to the Oreo tree of memory.

On the other hand, 19% of respondents say the images "did not fit Oreos" – and therefore, represented a disconnect from the network of preexisting brand memories. This suggests an opportunity to further explore different consumer segments who may have different associations with the Oreo brand in their memories.

The subset of images shown in the visual memory map in Figure 3 are those that were most important for driving short-term unaided awareness of the brand, peak images powering attention and unaided awareness – but also the images that fit the brand – those most likely to be added in long-term memory to the Oreos brand image and thus contribute to long-term sales results as well.

In particular, the subset of images shown in this memory network repre-

sents: standout images from short-term memory; highly charged with emotion; fit within the brand's positioning.

What we see in this visual map, for example, are some "social" images from a Christmas TV commercial showing an elf in a convenience store buying Oreos and a family gathered around a table playing a "game of Oreos." But many of the "action" images are from the social media ads that briefly but strongly reinforce the idea that Oreos are cookies you can play with in your hands – you can twist them apart, you can dunk them in milk, you can make a reindeer out of them.

The brand team clearly understands the play value of Oreos, which is why most of the ads focused on that idea. They also understand the importance of the twist and dunk-in-milk shots, which is why these images recur across many Oreos ads – familiar tropes that become attachment points (in procedural memory) for linking new executions to preexisting consumer memories.

One might wonder where the rest of the images from these ads went? They are submerged even more deeply in memory, in the network of visual experiences.

Like a map of the U.S.

The memory maps shown here are like a map of the U.S. showing only the interstate highway system connecting the major cities. They leave out the many secondary roads connecting the towns and villages in the memory network formed by a brand's advertising.

Combing the strategic insights from the verbal semantic memory map with the executional insights from the visual map can more clearly reveal hidden brand meanings. Given how complex these maps can be individually, merely combining them into a single map can be confusing. So, in order to interrogate the complex dataset represented in these maps, a different, more interactive approach is needed.

Imagine that instead of looking at these maps on a static page you were looking at the verbal memory map on an interactive touch screen. To find the five images most associated with "playful snack," you push the "playful snack" button and see the associated imagery, as shown in Figure 4a. To see images with the closest ties to "different from other brands of cookies," you push that button and see the answers shown in Figure 4b. These images may become candidates to add as the visual inputs to your creative brief to make the marketing mission more intuitive to creatives.

On the other hand, to learn what the iconic Oreo milk-dunk shot means in a strategic sense, switch to the visual map and click on the milk-dunk image – and see the answer in Figure 4c. To see what the Christmas elf in the convenience store means, click on the picture of the elf in the visual map (Figure 4d.)

Together, the verbal and visual brand maps give marketers a balanced view of the brand-building effects of a working set of ads – quantifying how both the verbal and the visual, the rational strategy and emotional executional components of a brand each contribute to purchase intent, and to brand equity.

To summarize, let's revise a familiar adage: Not only is one picture worth a thousand words but also one word is worth a thousand pictures.

Great, undiscovered country

As Nobel Laureate Daniel Kahneman in his book "Thinking, Fast and Slow," points out, "The remembering self is sometimes wrong, but it is the one that keeps score ... it is the one that makes decisions." Branded memory remains the great, undiscovered country of advertising and brand research. It is time we started to map it.

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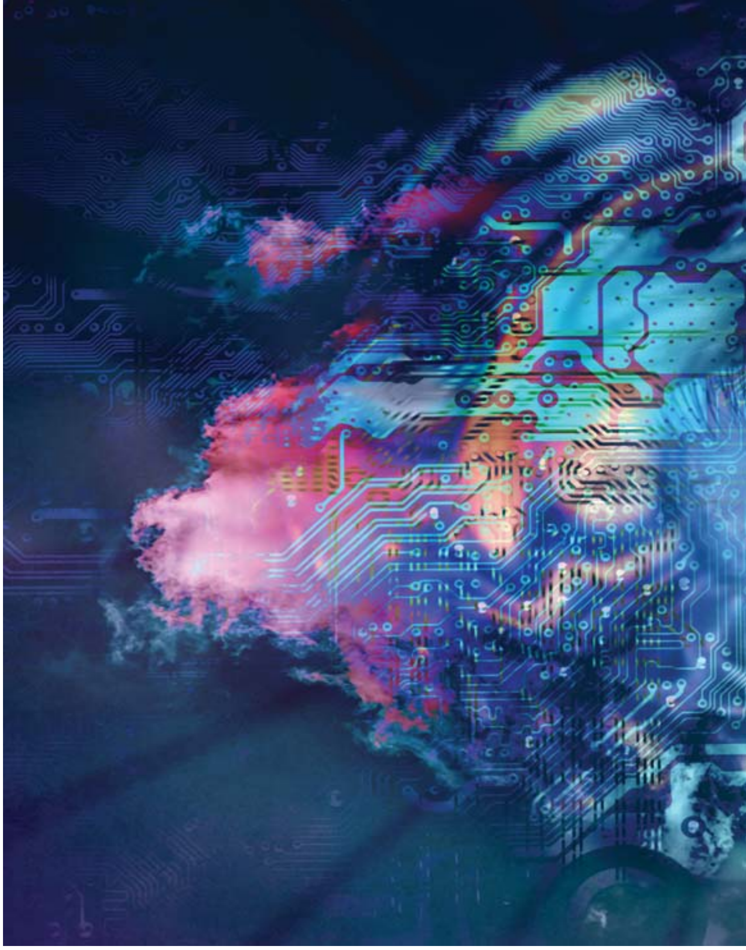
••• ad research

The eyes have it

How System 0 determines communications success in the new digital environment

| By Michael Schiessl, Philipp Reiter, Jan-Philipp Görtz and Jeff Bander



snapshot

The authors argue for the addition of measuring System 0 as part of assessing the impact of ads.

In the first half of the 20th century, still dominated by Johannes Gutenberg's printing press, it seemed sufficient in market and other social research to simply ask people's opinions in order to find out what their actions would be. The time of this "explicit" research (or System 2) was one of print ads, billboards, posters and newspapers, which in the interwar period added the cinema and radio (broadcast and advertisement). It was a brave old world of "rational thinking," analogue technology to go with conventional, black-and-white pictures with some radio sounds. Print media especially have an almost captive audience, as the process of reading words from analogous media requires active participation and limits readers' ability to digress.

This Gutenberg universe was subsumed by television in the 1960s. TV integrates visual and audio information into one powerful medium with the potential to monopolize attention of an increasingly passive audience. Furthermore, due to its ability to tell stories with color, motion and sound, television reaches deeper into the emotional spheres (System 1). This, the emotional drama of TV, is the motive behind implicit research to gauge emotional responses and effects. Together System 1 and 2 (emotion and cognition) cover roughly 80 percent of a person's experience. So far, so good.

What about the remaining 20 percent? Actually, it seems to be becoming more important in communications. The last 15 years have seen yet another revolutionary development and with it the dawn of a new era: the mobile internet and screen revolution made possible by powerful networks and numerous new tech devices. Multiple new and less-linear media choices have become available for users and consumers. In their wake the human experience has become even more fragmented and fast-paced. Content and advertising are merging into a deluge of information and entertainment that threatens to overwhelm users, consumers, advertisers and media companies alike.

The onslaught of content can be seen from the results of a study we undertook in recent years: the EyeSquare Media Attention Benchmark.

For this we analyzed the results of hundreds of studies, with more than 230,000 participants, across more than 2,300 ads and creations (about 1,100 were online, 700 TV, 400 print and more than 100 out out-of-home). The result: Only 10% of advertising contacts last longer than eight seconds. This shows changing viewing habits, which are a consequence of multiplying media options. Whereas in former media eras it was either System 1 or System 2 that were the "limit to experience," it now appears that it is almost sheer human perceptive capacity (the senses – especially the visual sense or perception) that is a prime limiting factor (gate) to experience and communication. We call this gate System 0 and it matters more than ever: Whatever meets the eye may get in; what doesn't definitely won't. There is competition to get through this gate, a gate that up to now has been taken for granted. It forms the basis for the other two systems to even get involved.

Thus, this revolution has created its own crisis of the understanding of the effectiveness of communication and advertising – and cries out for innovation in research and analysis, in psychology and even philosophy. Fortunately, the digital revolution has also brought technologies to explore and analyze these experiences with new power, exactness and capacity.

Define and improve

Basically, System 0 is a psychological construct based on physiological data. It helps to define and improve measurement and description of perception. The interaction of System 0 with System 1 and 2 is decisive: Without System 0 there is no System 1 or 2. However, System 0 is itself not abstract but rather concrete yet individual. System 0 is especially meaningful for measuring the combination of iconic effects with the use of syntax and semantics. Whatever performs worse on the surface of the retina has a lot of catching up to do.

We have formulated three theses regarding the new paradigm that we call "System 0 – key gate to the digital experience." They are: the highly complex digital human experience requires a new analytical model; understanding System 0 is more important than ever; and advanced technology and research methods make System 0 insights possible.

1. The highly complex digital human experience requires a new analytical model.

The digital revolution entails a revolution of experience. What seemed forgotten – namely that the human being is neither simply rational nor emotional but also sensual – comes to the fore.[1] All together form the human person. It is also evident that what is not received in some form by the human senses is beyond our experience. For the "information economy" to become real it needs to pass through what one might call the "attention economy." There are essentially five senses, of which smell is the most individually diverse, whereas sight tends to be most evenly developed among individuals.[2] It is also the sense that is most affected by our visual media culture.[3] And while a sensual experience may never enter our emotional or conscious levels – or at least not immediately – it still impacts our behavior.

Nevertheless, the senses were never much of a study object – only for their medical pathologies. They were taken for granted while the rational and later the emotional spheres were seen as decisive for human behavior and experience. That may have been more reasonable in a one-medium environment, where media stimuli enter the funnel of our senses in a more orderly fashion. But this changes in a nonstop, multiscreen and multimedia environment like today's. Senses are almost constantly exposed to a barrage of stimuli. And the funnel's function – namely, actual attention (perception) – becomes more exclusive. Consequently, the attention being paid to a certain stimulus (a picture or ad) has become considerably shorter.

As we see from Figure 1, most attention[4] today is extremely short – a precious gift, often amounting to less than 2.5 seconds.[5] However, urban myths like "human attention is now shorter than that of a goldfish" are not supported by data. Instead, it is rather a consequence of the many visual options in today's

Figure 1: Quick to leave

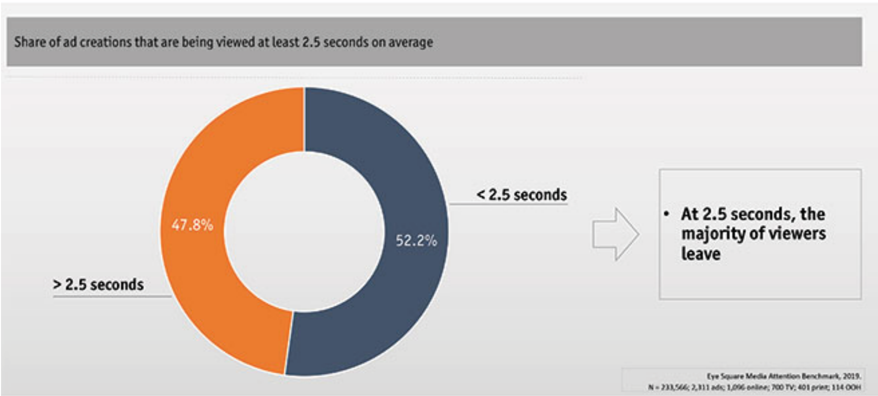


Figure 2: Rapid incline of effectiveness within 2.5-second threshold

media environment. And with such an abundance of stimuli available to the average viewer, it is not surprising that the first human filter – sight (the one "on the frontlines" of visual experience and preceding emotions and cognition) – becomes more and more important. Because what is not perceived is not experienced – and thus cannot be effective. As communication is supposed to have an effect, failure to be perceived means failure to communicate.[6]

As communication is supposed to have an effect, failure to be perceived means failure to communicate.

2. Understanding System 0 is more important than ever

Given what's at stake – namely the success of your communication – and given the fact that System 0 is the increasingly crowded gate for information to enter into our emotional and cognitive systems, it is evident that understanding how this gate operates is a key to understanding the whole human experience today. It is also evident that acting upon this knowledge will be the key to successfully passing System 0 and entering recall/memory and the subconscious and conscious decision-making centers of users and consumers.

As the actual usage of devices (especially in a multiscreen/touchpoint situation) and their ability to impact us is as of yet not sufficiently understood, many important questions – such as how to build brands in this context – remain open. Our studies give some insights, however. The most basic: There is no need for despair or trusting mere good fortune. The first 2.5 seconds of a contact deliver massive effect for later recognition of an ad's content (Figure 2). They are therefore precious. And they can and should be utilized. As these first seconds become more important, though, questions arise regarding the way advertising is created, placed and sold. System 0 is the new frontier of successful communications. And understanding it is the key to being successful.

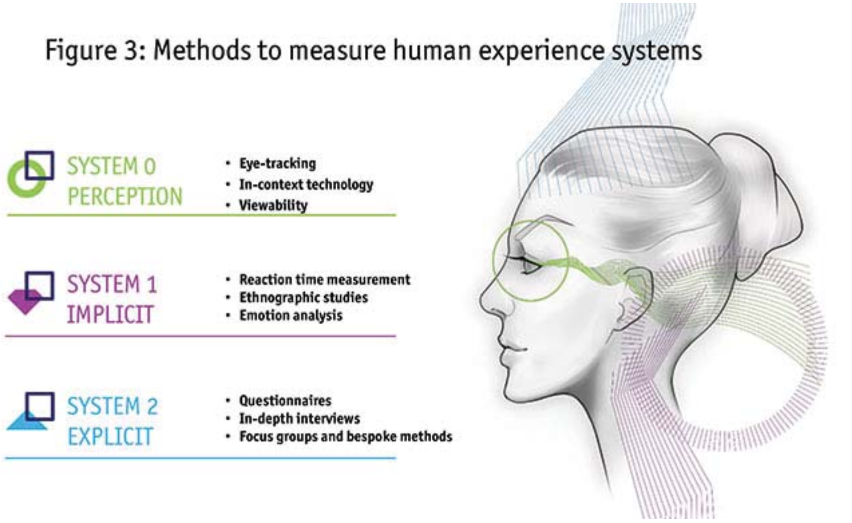
3. Advanced technology and research methods make System 0 insights possible

Advances in technology are not limited to media and entertainment, though. Research technology and methods for understanding perception have also improved a lot. Before the mobile/multiscreen revolution, mere technological indicators – such as clicks – served as proxies for attention. However, an active click is not enough because it often falls short of actual viewability. Viewability itself is a better indicator already and, importantly, is a standardized international measurement belonging to the System 0 arsenal. However, in and of itself it lacks conclusive explanatory power, as the "visible" information or visual might not connect with the retina of the viewer.[7] The mere fact that a stimulus is "viewable" on what may now be one of many screens for some number of seconds does not mean it is actually "viewed," i.e., perceived. While viewability is of course the "hard" precondition for perception, nothing less than an actual view is necessary for real contact and communication to take place.

Thus, mere performance orientation must be amended to become deeper and more precise. This requires new technological and intellectual approaches, such as combining eye-tracking technology with databases that can decipher the correlation between views and action, such as conversions. Studies such as our firm's Media Attention Benchmark found strong correlations between dwell time ("information intensity") and recognition, for example.

This important information shows that as actual attention (openness of the gate) per stimulus and creation decreases, information must become more intense, i.e., creations with a higher information density and speed will be more successful in the new era. Creation is key. And iconic, bold creations, which are most dense, may actually press a message through the gate and into the decision-making process de-

Figure 3: Methods to measure human experience systems



spite high volume. Successful creation will take this into consideration and needs some type of measurement itself.

Three factors

At Eye Square we combine all three systems in an in-context environment into our analyses (Figure 3). Our work regarding an understanding of System 0 focuses on three factors, their roles in the process of visual perception and the impact on Systems 1 and 2: machine (context and performance) – "the ability of the machine"/viewability; human action – eye movement, scrolling, zapping; and the stimulus (passive) – the object itself (especially the property of the stimulus in the respective medium, i.e., in context).

In the context of visual sense, measurability is relatively high, constant and dependable. In addition, there are international definitions for metrics such as viewability. These measuring tools, definitions and standards can be compared. For example, this would allow for a comparison between viewability and actual eye-tracking in order to establish a difference in predictive precision. Theoretical models could be developed from that.[8]

Our goal is to embed System 0 tests into browser tools – to put theory into code, so to speak. One potential application would be an online tool that calculates the quality of a stimulus/creation in context using viewability data and eye-tracking benchmark data. Right now, technology is more static than dynamic but integration of and into programmatic (even though programmatic itself has weaknesses) should become possible.

Ultimately, an integration of System 0 into the analysis will allow for an improved understanding of human experience – with better tools, faster, more agile and less resource-intensive testing and consulting. An improved understanding of the precious first seconds will help media producers and advertisers better appreciate attention, not take it for granted and reward it instead. Users and consumers, in return, will reward their efforts.

The mere fact that a stimulus is "viewable" on what may now be one of many screens for some number of seconds does not mean it is actually "viewed," i.e., perceived.

Goes full circle

Understanding, accepting and owning the challenge of intensity will go a long way to success in the new era of communication. It may be that, as the human species grows into this new era, it reverts to the primitive (yet information-dense) communication via icons, symbols, images – and thus goes full circle back to the times of hunters and gatherers who needed to perceive laterally and act quickly in order to survive. Attention in this context is like a fast orientation in a confusing environment. While it does not work like emotion and reason, it does not contradict them. Instead, it amends their utility.

If the less dense yet more sophisticated emotional and cognitive layers can be involved, this can actually lead to a more holistic way of being and communicating, one that transcends the limits of mere rational or emotional communication prevalent in the last (industrial) century with its linear communication. One that goes a longer way to understanding human experience and ultimately to getting more than you can see.

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6 https://insider.integralads.com/viewability-ad-effectiveness-publishers-need-know/

7 For a further discussion of the elements of (visual) effectiveness in the case of video ads and possible ad effectiveness metrics based on visual factors see Reiter, Schiessl, Thölke, et al, in: "Stay tuned! Assessing the effectiveness of social media ads." Marketing Review St Gallen, 3/2016, pp 10ff.

8 This might become necessary, as tracing-data/cookies are increasingly wiped out as people refuse/delete cookies, etc. Empirical data needs to be complemented with theoretical knowledge.

ad research

Permanent or passing?

Why brands need research to gauge pandemic-fueled shifts in consumer habits

| By Carly Fink

snapshot

Carly Fink looks at how media consumption has changed during the pandemic and the resulting impacts on brand equity and advertising.

Back in the "good old days," there was no internet and the number of TV channels that you could watch was limited. Brands could be easily seen and heard with smart messaging and a strong media plan. However, the invention of the internet and widespread technology has changed the way people consume media and purchase products.

The COVID-19 pandemic has massively accelerated the rate of technology adoption. Americans are relying on working and shopping from home. As a result, people are using technology more than ever and the usage of work software has skyrocketed.

As a result of this increased online usage and technology adoption, consumers' media consumption has evolved further. This behavior modification impacts how advertising drives brand equity. Brands now must have a strong online presence throughout every stage of the consumer purchase journey.

Brands must analyze the current purchase journey of the service or product to make sure that it reflects this high online media consumption. It is no longer a simple task to understand what drives awareness, conversion and, ultimately, loyalty. Brands need to determine if they reflect their consumers' digital behaviors as well as any offline tendencies that have remained or may reemerge post-pandemic. Therefore, the consumer journey needs to be reevaluated and brands need to understand consumers' use of online shopping/e-commerce and in-store shopping, etc.

So, how can market research capture these changes? How can research determine market potential, the optimal marketing mix and the success of current advertising initiatives? Are there any behaviors that customers are currently doing that are not known by the brand? Has a new audience emerged due to the pandemic?

There are no one-size-fits-all solutions to consumers' changing behaviors. Every brand has its unique target audience, path-to-purchase and attributes unique to its brand and industry. Therefore, a template survey

or guide may not work in this ever-changing world. This article will map out how to evaluate behavior change and what that means for a company's advertising and media strategy.

Assess any differences

Has the brand previously mapped out the consumer journey? If not, a brand should do so and assess any differences between its competitors. If the brand already has a strategy in place, it is critical that the strategy is reevaluated in 2021. While "how" consumers interact during the purchase process has most likely changed since March 2020, the actual steps to driving conversion remain the same. The steps often follow the outline below:

- **Need**: When does the need arise? How does the market differ as compared to before the pandemic? Where do consumers look to solve the need (channels, word of mouth, etc.)?
- **Awareness**: Which brands are they aware of? What are the benefits of the brands? What is unique? What is the same? How did they learn about these brands? How has perception changed since pre-pandemic?
- **Consideration**: What brands are in their evoke set? How do they compare the different options? What are the criteria needed to help make the decisions? How has the decision-making process changed in the last year?
- **Purchase**: Where/how did they ultimately purchase the product? Has purchasing in-store vs. online changed? What are the barriers to purchasing or switching? Is in-store behavior expected to go back to normal levels post-pandemic? Is there a setup/integration process?
- **Loyalty**: What helps drive repeat purchases? Referrals? Is it hard to switch brands? How is price-sensitivity a factor in driving loyalty?

For each of these stages of the consumer journey, it is essential to determine what online and offline channels are being used (e.g., in-store advertising, organic search, reviews, sales reps). What is the relationship between online and offline behavior? For example, a person may learn about brands in-store and then go online to a comparison-price website to find the cheapest price. Another scenario could involve a consumer becoming aware of a product via TV or Instagram but then using online reviews to determine if the product is up to par.

Mapping out the journey for both the brand and its competition can determine the following at each stage: advertising key message; advertising tone and look; call-to-action; online and offline media channels to use; expected and missed sales per retail channel (online and offline); and what KPIs (metrics) are needed to evaluate success.

In this new era, the information will show advertisers and media buyers where to focus their energy; it can cause a redistribution of messaging, the creative and even the media plan.

When evaluating each stage of the new consumer journey, it is crucial to determine if there are gaps in this plan; this includes areas with no data to back up a rationale. If this is the case, research is needed to help fill in the blanks. Below are five ways to create an up-to-date and actionable consumer purchase journey:

1. Easily available internal data. The first step is to see what information the company already has. From sales revenue data to Google and Facebook Analytics, most brands already have access to insights that can tell them a lot. This type of information helps provide clues on prospects and customers, including where they shop and analytics on the company's assets (e.g., website, social media sites, in-store data). Most importantly, it is vital to compare current data to historical information to see if media habits have changed during the pandemic.

For example, by simply reviewing Google Analytics a brand can learn:

- Is there an uptick in web traffic?
- Which types of devices are consumers using

to visit the site?

- What location (geography) are prospects visiting from?
- What is the source of website traffic (e.g., paid search, article, e-mail)?
- What actions do they take on the website (e.g., purchase product, fill out a contact form)?

2. Readily available external data on competitors and industry trends. A brand's competitive landscape is continually evolving, especially since the beginning of the pandemic. Staying on top of what the competition is doing helps a brand determine where the brand's journey is strong or weak. Ultimately, this information creates a more robust advertising and media plan.

There are several free and low-cost options available that can help inform the competitor's consumer journey. This information can identify white-space market opportunities. Given how the pandemic has changed consumption, it is vital to look beyond the direct competitors to stay ahead of the curve by also tracking the indirect competitors.

Freemium tools such as SimilarWeb, Semrush, Moat, iSpot.tv and Follow.net can deliver a wealth of data about competitors' online behavior at a low cost. The tools provide competitors' web traffic and online advertising as well as online ad spend. More expensive options such as Numerator and Kantar Advertising Monitor offer both offline and online analysis.

Furthermore, several companies (including research companies) have published thought leadership research on behavior change during the pandemic. This information may be useful in understanding overall industry trends.

The pandemic has not only changed media habits but also uprooted habits and routines. The impact of these shifting behaviors has also created potential new audiences for brands.

3. What does the new consumer landscape look like? By surveying a representative population of purchasers of the industry's product or service, a brand can determine how the demographics and psychographics of its and the competitors' customers have changed and if a new audience has emerged. The pandemic has not only changed media habits but also uprooted habits and routines. The impact of these shifting behaviors has also created potential new audiences for brands.

Understanding how consumers have changed purchasing and media habits allows for a brand to target its customers and prospects better. The research can also reevaluate messaging and media habits to determine changes.

4. Speaking to customers, competitor customers and new-to-the-industry prospects. To better understand how consumer media habits have changed in the last year, qualitative research allows a brand to understand better what it is like to walk in your consumers' shoes. Also, qualitative research helps uncover core drivers impacting brand perception and whether these views have changed. The company may also want to speak to industry experts to gain an additional perspective.

5. Putting everything together. Evaluating the consumer journey using multiple research methodologies is helpful. However, putting together the extensive analysis into one document is not an easy task. Reviewing and analyzing the data in a brainstorming session with leadership, advertising and media agencies provides multiple perspectives on putting the journey together in an actionable manner. It is helpful to have a moderator in these sessions to ensure the session is as practical and actionable as possible.

Furthermore, the sessions can help secure buy-in from leadership and the decision-makers if the current advertising and media needs to change due to the acceleration of online media habits.

With an updated consumer journey, brands will have the much-needed direction on how to adjust media and advertising initiative as well as measure each aspect's success. As technology adoption continuously increases and behaviors will change post-pandemic, it is crucial to add and modify the pathway.

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••• the business of research

A predictable result

The election polls were wrong (again). Now what?

| By Brooke Reavey and Sheri L. Lambert

snapshot

The authors offer ways for political pollsters to learn from marketing researchers and improve the accuracy of their data.

After yet another shaky performance in the 2020 elections, pollsters are being roundly derided for "getting it wrong" and the death knell is being sounded for the industry. But, as Nobel laureate Niels Bohr once said, "It is difficult to make predictions, especially about the future," and this is even more true when those predictions are about human behavior.

Voters are, after all, human. Connecting attitudes – when people say they like or dislike something – to behavior – actually purchasing the product – is a problem that marketing researchers have spent decades contemplating, researching and adjusting statistical models to improve accuracy and predictability. In the business world, the market is more understanding when analysts (pollsters) over- or undershoot forecasts based on consumer attitudes. At worst, sales remain stagnant. At best, sales increase. Either way, botching a sales forecast does not generally trigger widespread criticism quite like what occurs with political polls. However, pollsters who use the same statistical techniques as marketing researchers (i.e., surveys based on attitudes) appear to be held to a different set of standards.

Pollsters need to look at a multitude of facets of what the voters are saying and how they are saying it. Pollsters need to update how they conduct and collect their research. To that end, what is being said on social media platforms cannot be discounted.

Prior to election night last November, the overriding expectation was for a "blue wave" that would see Joe Biden sweep past Donald Trump with a comprehensive victory. However, the results were much closer, with Trump's support overperforming expectations. An anticipated Democratic clean sweep of the main legislative and executive branches of government did not materialize. Overall, the polls were on point in evaluating Biden's support but they underestimated Trump's voters.

This isn't the first time we have seen this. Past polling results show

several high-profile polling misses, including Trump's 2016 victory following earlier predictions of a Clinton landslide.

Every election cycle, pollsters are tasked with predicting the direction of the election based on survey research. And survey research, as all market researchers know, is only as good as its sample.

It is true that political polls are more difficult than a typical consumer market research study, because the linkage between attitude and behavior is more distant than in most consumer goods. Specifically, the attitude link is part of it but then there is the all-important model of who is likely to vote. This exists as well in consumer research but what we are likely seeing is a degree to which the disconnect between attitude and likelihood of action is determinative of the answer, which is why the weighting is so important. In consumer research, this secondary linkage is well developed. Also, other than big-ticket items like cars, for CPG, the time between attitude measurement and purchase is frequently quite short.

Garbage in, garbage out

As the old saying goes: Garbage in, garbage out. Market researchers commonly refer to this phrase by explaining that if the sample of people being interviewed is mediocre, so too will be the results. Pollsters know this adage well and take strides to prevent their polls from ending up as rubbish. The methodology of the poll is typically cited by the poll and poll aggregators like Nate Silver's FiveThirtyEight take this into consideration when crunching their numbers and offering their forecasts. Additionally, after 2016's presidential polling upset, pollsters adjusted their methodology for the 2020 presidential cycle. According to Geoff Skelley and Nathaniel Rakich of FiveThirtyEight, pollsters adjusted their methodologies for 2020 in the following ways:

Weighting results differently based on education. Many pollsters included more from the "high school or less" group and less from the "college or more" group. Ipsos and Pew Research Center even went so far as to weight the data within racial groups, a technique that is not typically done.

Paying attention to where the respondents live: rural, suburban and city. As was discovered in the 2016 polls, not enough time and effort was taken to ensure that rural voters were included in polls.

Adjusting methods in which they reach respondents. Polls have always deferred to either internet panels or via telephone by using random-digit dialing. But both methods are fraught with problems regarding self-selection and non-response bias. Moreover, pollsters speculate that many respondents may have hidden their support for Trump from the interviewers due to social desirability bias. In 2020, pollsters expanded their internet panels to include more people and they also adjusted their phone interview methods switching between random-digit dialing (typically used for landlines) and using a person to manually dial the phone number (a process required for calling cell phones).

As survey researchers know all too well, the incidence rate of the study – the prevalence of the topic being studied in society – drives up the cost of the study. The lower the incidence, the more expensive the study and vice versa. Pollsters run into this problem as well.

The difference between polling for the presidential election versus a House seat is like night and day. Regarding complexity, a Senate race often falls right in the middle. According to Pew Research, as of election day, there were 245.5 million Americans older than 18 and 157.6 million registered voters. The incidence rate of finding eligible voters for the presidential election is much higher than finding eligible voters for a House of Representatives election because there are 435 congressional districts with

House elections versus one country for a presidential election.

When the sample is further stratified by race, gender, education level, residence and likelihood to vote (based on previous voter behavior), the sample size needed for a statistically valid research study requires many thousands more respondents than are typically used in a political poll. The more respondents there need to be, the more costly the survey is, regardless of the method, to reach the respondents. Therein lies the problem. Media outlets and political campaigns have limited resources to spend on polling. Historically, pollsters have chosen to keep the sample size "reasonable" by conducting more, smaller polls over time, each with a moderate error margin as a way to monitor voter sentiment. If this trade-off is poorly executed, there are consequences: an erosion of public trust in the polls, lower donations that might help a candidate win a tight race and incorrect or misleading opinions regarding public policy questions that frequently accompany the poll (i.e., sentiment on a mask mandate, the importance of the COVID relief bill, etc.).

Key methodology suggestions

So, what can be done differently? Marketing scholars have worked alongside firms for decades to help improve the accuracy of models that convert purchase intent (attitude) to a purchase (behavior) and in this case from intending to vote to actually vote. Some of the key methodology suggestions regarding the future of polling are the following:

Machine learning can help with sampling. Using exogenous data points at the local level (i.e., voter turnout, previous response to survey) can help marketing researchers home in on the areas that require more responses.

Demographic "buckets" are misleading because they ignore intersectional factors. Demographic categories are often treated as monoliths and journalists and campaigns frequently speak about groups of voters as such (the "Black vote," "the rural vote"). Digital marketing researchers learned long ago that segmentation works best at the individual level (micro-segmentation). Pollsters lag in this understanding. There is quite a bit of variance within each demographic bucket (i.e., race, education level, etc.). It's myopic to assume that all white people will vote the same way (which seems obvious) but then why do pollsters lump all Latinos into a single demographic bucket, as if Mexicans, Puerto Ricans and Central Americans were monolithic? Sampling methodologists often forget the importance of understanding how social aspects intersect. Knowing what we know now, what candidate would a highly educated female Hispanic who is a practicing Catholic have voted for? That was a trick question. Would it depend on whether we were told that the person in question was of Mexican heritage, living in a suburb of Dallas vs. of Puerto Rican heritage living in Brooklyn? By viewing the tabs that are often broken out by individual demographic categories, the marketing researcher does not get the whole picture of the voter. In "demo" buckets, we don't consider all of these factors. The most obvious example of this in 2020 was that the polls missed the tens of thousands of Cubans who appeared to vote for Trump mainly because they were voting against Biden.

More time and money are needed to increase the sample size, thus increasing accuracy. News agencies and campaigns need to spend more money on polling and less money on expert commentators and/or ads. Whoa – we said it. There is a reason why we teach confidence intervals and error margins. It's time to start paying attention to them if we want more accurate polls.

Machine learning can assist in election predictions. It's early days but marketing research has several AI startups that combine attitude and behavior data to create a comprehensive picture of consumers. By combining polls (attitude) with voting history (behavior) as well as including data on local consumer touchpoints (local employment levels, number of polling locations per thousand voters, online consumer sentiment using geolocation from social media, etc.), AI can help predict the directionality of the vote (i.e., Democrat vs. Republican). This does border on creepy but these inputs are helpful in determining the reliability of the data.

Election forecasting is actually a two-model process and it isn't completely clear at which point in the process the model accuracy needs improvement. First, polls need an accurate understanding of voter sentiment from a representative sample of voters. Second, there needs to be a model of turnout, which is who is likely to vote. For the polling process, we can assume two trade-offs. First, the more expensive the poll, the more accurate it will be (larger sample, more representative). Second, the more recent the poll, the more accurate it will be. Aggregators like FiveThirtyEight recognize this. One question that should be asked is whether the emphasis on recency is worth it. Perhaps it is better to conduct fewer, more expensive polls and to assume that sentiment is less labile than commonly thought.

Integrating sources

So, how should the polling industry react to the recent U.S. presidential results? The industry should better predict the outcome of the election by integrating other sources of data including social media, past behaviors, election issues, voting turnout, state results, money raised, advertising budget, media trends as well as economic indicators. Or, at the very least, start taking advice from the marketing research personnel who work with brands daily to translate attitude to behavior.

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Getting the conversation started

Best practices for private online panels

| By Jerry Thomas

snapshot

From recruiting it to maintaining it, Jerry Thomas gives guidance on how to set up a private online panel.

Over the past decade, many corporations have set up private online panels or online communities as an economical way to conduct surveys and qualitative projects. A private research panel (sometimes called a custom panel, customer panel or proprietary panel) is created by a company solely for its own use. The company recruits and maintains the online panel and uses the panel exclusively for its own research purposes. While many private online panels are a success, many are deemed failures. The purpose of this article is to outline some guidelines and best practices for private online panels.

Private panel versus online community

A private online panel is sometimes confused with an online community. Typically, a private online panel is made up of thousands of participants, while an online community tends to be much smaller (i.e., hundreds of members). A private panel tends to have a long life; it can be successfully operated for years. A community, however, is often limited in life (maybe a few months or a year) to minimize the risks of respondent conditioning. Private panel members are rarely permitted to interact with other panel members but an online community might allow its members to interact.

Online communities tend to be less expensive to operate than private panels because the number of participants is smaller and the same community members are used over and over again. Sampling controls are minimal for communities but they can be quite rigorous for private panels. As a best practice, it is probably wise to think of communities as qualitative research and to think of private panels as quantitative research (although both can reverse roles at times).

Budget pressures

The growth in the number of private panels is largely a function of a slow-growth world economy and the corresponding budget pressures within large corporations. It is the lure of cost-efficiencies that prompts most companies to consider private panels. Under optimal conditions, a private online panel can reduce the cost of a typical research project by 25 to 35 percent.

Falling response rates to online commercial access panels is also a major reason for the adoption of private panels (where response rates tend to be higher). Another major factor is category incidence. If a company's product is used by only 1 percent of the population or less, then a private panel of customers might be the only affordable way to do research. Another consideration is the degree of consumer interest in the product category. High-interest product categories are generally better candidates for online private panels but even low-interest categories can often benefit from private panels.

Limited value

Private online panels are not appropriate for all types of research. If marketing directors are trying to survey a representative sample of all adults, then the private panel is of limited value since it most likely contains only customers or those interested in the brand (subsets of the total adult population). Many studies, however, can be conducted among customers or those interested in the company's brand; it's not a perfect sample but often it is good enough to help make the correct decision. It is also possible to recruit non-customers into private panels but the recruiting costs for non-customers can be quite high.

One of the first questions marketing directors must ask is, "Will my company really use the private panel once it is set up?" We have set up a number of private panels for clients with big research plans that never materialized. Each one planned to use their private panel frequently but the burdens and mechanics of proposing studies to internal audiences, getting approvals, preparing purchase orders, writing questionnaires, pulling samples, tabulating the results and trying to write reports bogged the whole process down. Therefore, few studies were actually conducted and these private panels were never economically viable.

The economic feasibility of private panels all depends on the financial details. Every product category is different, so marketing directors will have to sit down and do the math for their particular situation. As a rule, if a company does not conduct at least one research project per month, a private panel will rarely make economic sense. That is, the expense of setting up and maintaining the private panel will be greater than the savings on the research studies.

Another consideration is the subject matter of the research. High-interest product categories are the best candidates for private panels. A panel of golfers or pilots or sailboat captains or motorcycle owners will work like a charm because the respective panel members are very interested in the categories. It would be easy to recruit panel members and participation rates in surveys would be high.

Conversely, if marketers want to set up a panel of insurance owners or water-utility customers or banking customers (comparatively low-interest categories), it will be much more difficult to recruit panel members and response rates to surveys will be low.

Lastly, the lower the incidence of a product category, the greater the potential savings from a private panel is likely to be. For example, if a product category happened to be experimental aircraft, the percent of the population (i.e., incidence) of those who build experimental aircraft is far less than 1 percent of the U.S. adult population. If a company had to screen large probability samples of U.S. adults to find experimental-aircraft builders, every study would cost a small fortune. But if marketers owned a private panel of these aircraft enthusiasts, studies could be conducted at modest costs.

Advantages

If a private online panel is set up and managed properly, its advantages are:

Better decisions. More marketing questions can be addressed and answered, based on objective consumer feedback.

Economy. Surveys via private online panels typically save 25 to 35 percent versus the price of traditional online surveys. The savings are even greater for low-incidence categories.

Speed. Most surveys are turned around in 14 days (from questionnaire design through final written report). Complicated projects take longer, of course. Having the private panel in place – and all the paperwork and approvals taken care of – means that a company can launch a survey almost instantly in the event of an emergency or urgent need.

Accuracy. Private online panels can provide reasonable, balanced samples (demographically and geographically).

Response rates. Private panels tend to enjoy much higher response rates, compared to commercial online access panels. This could be a greater advantage in the future if response rates for commercial panels continue to fall.

Longevity. Private panels can last for years if new panelists are added on a regular basis and older panelists are removed from the panel.

Best practices

Companies tend to reap the greatest benefits from a private online panel when it is properly managed and its use is encouraged. To achieve best practices, marketing directors should:

- Assign one person to be responsible for scheduling, expediting and coordinating with internal groups or brand teams so as to keep research projects moving ahead.
- Consider quarterly omnibus surveys where each group or brand can submit a question or two.
- Charge the private panel's cost to a central marketing budget so that it is "free" to individual brands or groups. If the studies are free, brands are eager to do as many studies as possible (and thereby make better decisions).
- Simplify the approval process so that a group or brand team can launch a private panel survey with minimum paperwork (no purchase orders, no elaborate approval processes).
- Standardize often-repeated types of studies so that the organization learns over time what the answers mean.
- Create a database of normative data for the standardized studies so that results have greater value and meaning.

Internal staff versus outsourcing

If a marketing director decides to set up a private panel, should she do it herself with internal staff or outsource it to a research firm with experience in private panels? The larger the company and the greater the number of projects, the more likely it is marketers should staff up and do it themselves. If they plan to do more than 100 or 150 research projects a year, then building a professional internal staff might make sense. Remember, marketing directors will need to hire some individuals with research and supplier operations experience – folks who really understand the nuts and bolts of panel management, sampling, questionnaire design, coding, tabulation, quality assurance, data security and e-mail deliverability.

Also, the company will need an array of software to support the operation of a private panel. If a company is likely to use a private panel for fewer than 100 projects a year, it should probably outsource the private panel to a research company with expertise in private-panel development and management. The research firm will manage the panel, answer e-mails and phone calls, help keep projects on schedule, provide all the software and programming, design questionnaires, conduct the surveys and write reports for the company.

Purchasing a turnkey private panel service frees up marketing directors to be the research consultant within the organization, rather than the research mechanic. Directors can operate with minimal staff, since most of the work is performed by the private-panel partner.

Recruiting tips

Recruiting a private panel can be a challenge. The best way is to collect customer e-mail addresses is at every point of contact with customers. Then the company will have a massive database of customer e-mail addresses from which to recruit for a private panel. If the company does not have customer e-mail addresses, then panel recruiting tends to be expensive. Marketing directors can insert panel invitations in packages. They can mail letters to targeted groups inviting them to join. They can purchase opt-in e-mail lists. They can post a link on their website. They can send out publicity releases announcing their panel. The best methods of recruitment vary by product category and marketing directors will have to experiment to identify the most cost-effective methods.

Threats and risks

Once a marketing staff starts recruiting for a private panel, they will need to be careful that a few panel members don't join the panel multiple times or complete the same survey more than once. A best practice is to use digital fingerprinting to identify duplicate respondents. A major risk is the potential liability resulting from hackers gaining access to panelists' personally identifiable information. Another best practice is to encrypt all panelists' data at a high level of security. If large numbers of e-mails are sent to panelists via a corporate e-mail system, marketers might find some internet service providers (ISPs) shutting down delivery of the corporate e-mail. A best practice is to set up a completely separate system to handle private panel e-mails. Even so, there is always a risk that some ISPs will block delivery of e-mails to panelists, so it is important to track e-mail delivery and response rates by ISP.

Another risk is panel attrition. If the panel is not nurtured and used, panelists will quickly lose interest and drop out. Best practices here include sending birthday cards and other communications to panelists, answering all e-mails and phone calls promptly and using each panelist 10 or more times per year. Respondent fatigue is also a risk if questionnaires are long and tedious or poorly designed. A best practice is to keep questionnaires short and concise. Longer questionnaires are possible for some categories and incentives can make longer questionnaires acceptable to participants.

One final risk in some countries revolves around accessibility. If your corporate communications promise equal access to all, regardless of their disabilities or handicaps, then your surveys must be accessible (a very high standard to meet). Legal risks can be significant in these instances.

Just one tool

A private online panel can be a useful tool in the research toolbox but it is just one tool. In-house marketing directors will still need professional research agencies to help the company with studies that require probability samples (market segmentation, benchmarking, volumetric forecasting, etc.). They will need research suppliers to help with central-location studies, in-person interviewing and qualitative research. They probably will still need professional research firms to help with very complex studies (choice modeling, segmentation, optimization, etc.). They will also need professional research companies to help with major strategic projects where objectivity and outside perspective are crucial. However, for the day-to-day tactical studies among a company's customers, private online panels may be an option to consider.

Jerry Thomas is president and CEO of Decision Analyst, an Arlington, Texas, research firm. He can be reached at jthomas@decisionanalyst.com.

••• the business of research

One of these things is not like the other

Using cognitive demographics to reframe how we think of and categorize people

| By Susan Fader

snapshot

Susan Fader on why companies should make sure their views of their products and services line up with those of consumers.

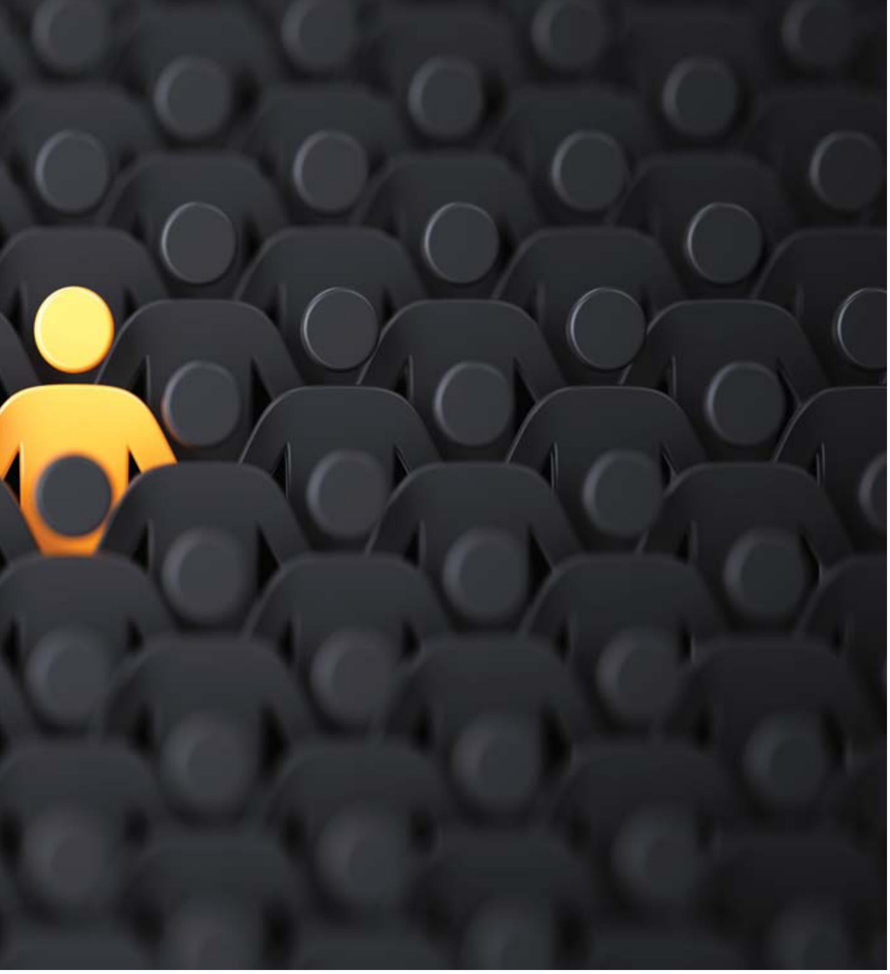
In order to field any type of research study, one has to interact with people – whether it is an in-person conversation or a self-administered questionnaire. Companies have spent inordinate amounts of money creating demographic and segmentation profiles of their customers, potential customers and "non-users." They rely on these demographic specifications and segmentation profiles to determine who is or is not included in research. These categorizations are also used as guidelines for organizing databases and determining what potential research participant sample might be purchased. The people included in research are a major prism through which research data/findings are analyzed and business decisions are made.

It is human nature to try to group like things together and it is a major way that helps accelerate processing information, seeing patterns, making connections and discovering opportunities. We start as toddlers matching similar shapes and colors, so it's not surprising that in this data-rich world, companies generally create a handful of what they think are distinct demographic profile groupings that capture the key demographics of the people they want to do research with. By filtering any research findings through these specific demographic groupings, there is the belief that it will both speed and improve our ability to analyze the data.

Currently, many of the grouping profiles follow the rules that were set in place years, even decades ago. Many rely primarily on traditional demographic parameters (gender, age, relationship status, HHI, education and category engagement) that usually revolve around purchase of a product or service. Some profiles overlay attitudinal questions, which in many cases fall into whether they will be an engaged research participant (e.g., "I like to share my opinion with others.").

Maybe assumptions are off

So if research findings are based on feedback from these selected peoples' perspective and opinions, shouldn't we be reexamining the baseline assumptions that went into developing these groupings? Maybe the baseline



assumptions used to develop them are off. If so, then the research is being designed and recruited with perhaps the wrong understanding of who the people are and how they make decisions.

We have to do a better job of incorporating how people self-define and view the world, versus the categories researchers may be fitting people into. Traditional demographic groupings are based on an outsider – the company, the researcher – making a judgement call on the characteristics that determine how people fall into groups and how similar they are being perceived. In addition, since companies field research to help their businesses operate better, it is not surprising that companies tend to create demographic groupings that align with how their business units are structured, which may not replicate how people perceive the world their products/services exist in.

I feel we need to reframe how we view people and am calling this approach cognitive demographics. It has multiple uses including in the recruiting process; as a guide to help us listen better to what people are saying in research; and as a tool for better development and positioning of products and services. Cognitive demographics incorporates traditional demographics, plus the need to do a better job of reflecting diversity, equality and inclusion in the overall participant population. Cognitive demographics then adds another component that provides a way to better understand a person's value hierarchy – how they self-affiliate and make decisions. It also incorporates an emotional component of how people rationalize behavior and make decisions.

Determining whether a person utilizes analytical or holistic thinking is one of the keys to better understanding how people make a decision. Analytical thinkers tend to be linear thinkers who like discrete, rule-governed categories. Holistic thinkers focus more on the big picture, specifically first looking at possible relationships. Analytical and holistic thinkers may sometimes arrive at the same conclusion but their rationalization for arriving at a common answer can be dramatically different. In a triad task, a person is shown three items and asked which two go together. If a pig, apple and dog were shown, the analytical thinker may group a pig and dog together because they are both animals. A holistic thinker would focus on the relationship and thus group the pig and dog together because the dog protects the pig from predators. If you just looked at their answer and didn't delve into the fact one was an analytical viewer of the world and the other a holistic viewer of the world, you would have missed that how they view the world and process information is different, which ultimately can impact product/service interest, usage and purchase decisions.

Radically different

With a traditional demographics approach, people may appear to be falling into the same demographic group but how they perceive themselves and the world and make decisions may be radically different. Yossi Klein Halevi, an American-born Israeli author who is very active in Arab-Jewish reconciliation efforts, and John Zogby, the political pollster, both emphasize that a key to better understanding people is to recognize that a person's value system gives insights into how they make decisions. Halevi has spoken often about the fact that as humans we tend to share the same basket of values – family, community, work, religion, individual rights, the role of government etc. – but prioritize them differently and so we end up on different sides of an argument. Zogby, who conducted thousands of interviews for his 2016 book, "We are Many, We are One: Neo-Tribes and Tribal Analytics in 21st Century America," feels that "self-identified tribal affinities – shared values, life philosophies and outlooks… transcend demographics and other category-specific attitudes and behaviors, which would be the basis of a traditional market segmentation study."

In a research setting, recognizing how moms self-perceive their mom role can be crucial to understanding how they are making a purchase decision for a product for their children. Two moms may mirror each other when only using traditional metrics such as demographics, frequency of buying particular products and attitudes towards brands and thus be seen as being in the same segment, with the expectation that they would perceive the world similarly. Incorporating a cognitive demographic measure of how they view their role as a mother would show that these moms actually see the world very differently and therefore may be making purchase decisions using a different framework. One mom's motto may be, "I will do anything for my kids," putting her in the helicopter-parent category, while the other's is, "Go with the flow," which shows she is much more laid back when it comes to parenting. If you are fielding a new product, concept, messaging or pricing study, not recognizing that these moms think about their mom role radically differently can hinder how you make conclusions based on the research.

Another component of cognitive demographics is capturing how people perceive the world that your product/service exists in. A company's definition of the category it is in may be very different from how the consumer sees the world the product resides in. If you don't integrate how people perceive the role of your product/service in their lives, you may miss the big picture. As Theodore Levitt, an economist who helped popularize the term "globalization," famously said, "Customers who buy a drill aren't buying a drill. They're buying a hole in the wall."

Missed the big picture

Years ago, if P&G had integrated a cognitive demographic approach in the diaper category, it may not have missed the big picture, which ended up costing it a large market share that took years to recover.

Based on reams of research findings that consistently pointed to diaper leakage/need for absorbency being the No. 1 concern and purchase decision determinant, P&G invested tens of millions of dollars developing diaper and manufacturing capabilities to make Pampers the most absorbent/leak-proof diaper on the market. Then Kimberly-Clark made a big marketing push for a new version of Huggies, one that, while more absorbent than previous versions of Huggies, was still less absorbent than Pampers. To P&G's shock, with the introduction of this new version of Huggies, the Huggies share of market increased and Pampers declined. What happened? Had diaper absorbency/less leakage become less important? Were mothers lying about wanting to purchase diapers that were best at absorbency. Nope! Diaper leakage continued to be the overwhelming No. 1 frustration in the diaper category – even some moms buying Huggies were complaining about Huggies being less absorbent.

So what was going on? Well, P&G had a siloed, non-cognitive demographic view of the diaper category. It thought functionality was the lens through which moms saw the diaper world. But for a number of moms their take on diapers was broader and included a separate emotional component that impacted how they perceived their roles as moms. Through P&G's functional lens, P&G had viewed the emotional "being a good mom" component as a subsegment of functionality and that the act of buying and putting the more absorbent diaper on their baby was helping them fulfill the "good mom" emotional component.

Focusing almost exclusively on manufacturing the best leak-proof diaper on the market, and believing that the most absorbent diaper was the component that delivered on "good mom," P&G's diaper used a type of plastic liner that, while very effective in preventing leaks, also made crinkling noises when the child was picked up. Kimberly Clark recognized that the self-perception "good mom" component was, for a sizable segment of moms, not a subset of the absorbency functionality but an emotional driver that relied on other things beyond absorbency, i.e., moms wanted a diaper that didn't leak but also separately, the diaper they chose to put on their baby was also a reflection of how good a mom they were. A diaper that made noise suggested to this segment of moms that they were putting "unhealthy" plastic on their child. Huggies diapers were almost as absorbent as Pampers but their quieter plastic liner was doing a better job of delivering on a "healthier"/less plasticky diaper that moms could put on their baby. P&G lost share-of-market when these moms were willing to sacrifice some absorbency to get better delivery on the "good mother" emotional self-perception need. The new Huggies and the most absorbent Pampers both had about the same amount of plastic in the diaper, so if P&G had incorporated cognitive demographics to better understand that for a large segment of moms, the diaper world included a standalone functional and a separate emotional component, its research would probably have picked up that a noisy plastic liner would lead to loss of market share, even if that diaper offered the best absorbency.

Incorporating narrative economics – which uses stories as input to provide insight into how people you are interested in perceive and rationalize the world around them – can help the researcher get a better understanding of how to structure demographic profiles and understand people's feedback by providing context and background of how people self-perceive. (For more on narrative economics, see my December 2019 Quirk's article "Storytelling as an input, not just an output.") Narrative economics utilizes stories that people tell to get insight into how they rationalize their choices and see the world. One way to use narrative economics to get insight into people's values and how they see the world is to read memoirs, biographies and works of non-fiction.

An example is J.D. Vance's "Hillbilly Elegy," which gives insight to choices and decision-making in the world of poor/lower middle-class Rust Belt whites. Those decisions may appear illogical to an outsider (behavioral economics) but logical to them (narrative economics). For example, being close to family is one of their top values and prevents many who are jobless from moving from a place where there are no jobs to a place that has jobs, even if they are destitute. Another great example is Isabel Wilkerson's beautifully written "The Warmth of Other Suns," which uses the detailed life stories of three different Black Americans and their families to provide insight into the Jim Crow world and the impact on the 6 million Black people who migrated from the Southern United States to the Northern United States cities during the 1920s-1970s.

In addition to books, podcasts are also a great source for getting the world view of almost any specific demographic you may be interested in, but especially valuable if you are doing research on a topic with a very small universe. For example, if you are doing research for a rare medical condition, there is probably a podcast specific to that medical condition. The podcast may also be an avenue in to help recruit these difficult-to-find people to a research study.

Reality check

Utilizing cognitive demographics can be a reality check on whether the way researchers and marketers group people is truly matching how people self-perceive and make decisions. It can also help uncover instances where the alignment of company business units may not reflect a target audience's view of the world in which your products and services exist.

Susan Fader is qualitative researcher at Fader and Associates, a New York research firm. She can be reached at susanfader@faderfocus.com.

CALENDAR OF EVENTS

••• can't-miss activities

The Merlien Institute will hold its 2021 QUAL 360 EU event on **March 3-5** as a virtual event. Visit eu.qual360.com.

The Insights Association will hold its Qual Event on **March 9-10** as a virtual event. Visit www.insightsassociation.org.

Quirk's Media will host Webinar Wednesday on **March 24**. Visit quirks.com/events/webinar-wednesday-3-24-21.

Intellus will hold its 2021 Intellus Worldwide Summit online on **April 8**. Visit www.intellus.org/Events-Webinars/SummitVE-2021.

succeet will hold the virtual pillar of succeet21 on **April 14-16**. Visit www.succeet.de.

Intellus will hold its 2021 Intellus Worldwide Summit online on **April 15**. Visit www.intellus.org/Events-Webinars/SummitVE-2021.

The Society of Insurance Research will hold its Spring Conference on **April 15** as a virtual event. Visit bit.ly/3b3Zage.

The Merlien Institute will hold its 2021 MRMW EU event on **April 20-21** as a virtual event. Visit na.mrmw.net.

Quirk's Media will host Webinar Wednesday on **April 21**. Visit quirks.com/events/webinar-wednesday-4-21-21.

The Society of Insurance Research will hold its Spring Conference on **April 22** as a virtual event. Visit bit.ly/3b3Zage.

Intellus will hold its 2021 Intellus Worldwide Summit online on **April 22**. Visit www.intellus.org/Events-Webinars/SummitVE-2021.

Intellus will hold its 2021 Intellus Worldwide Summit online on **April 29**. Visit www.intellus.org/Events-Webinars/SummitVE-2021.

The Society of Insurance Research will hold its Spring Conference on **April 29** as a virtual event. Visit bit.ly/3b3Zage.

The Pharma Market Research Conference USA will be held on **May 12-13** in **Newark, N.J.** Visit usa.pharmamarketresearchconference.com.

The Insights Association will hold its NEXT 2021 event as a virtual conference on **May 18-19**.

Quirk's Media will host Webinar Wednesday on **May 26**. Visit quirks.com/events/webinar-wednesday-5-26-21.

The Merlien Institute will hold its 2021 QUAL 360 NA event on **June 16-17** in **Washington D.C.** and virtually. Visit na.qual360.com.

Quirk's Media will host Webinar Wednesday on **June 23**. Visit quirks.com/events/webinar-wednesday-6-23-21.

SampleCon 2021 will be held on **July 12-14** at The Langham in **Pasadena, Calif**. Visit samplecon.com/samplecon-2021-live.

The 2021 Quirk's Event – London will be held on **July 20-21** at the InterContinental London O2 in **London**. Visit www.thequirksevent.com.

Quirk's Media will host Webinar Wednesday on **July 28**. Visit quirks.com/events/webinar-wednesday-7-28-21.

The Insights Association will hold the X Event 2021 on **August 3-4**. Visit www.insightsassociation.org.

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.

Quirk's Media will host Webinar Wednesday on **September 1**. Visit quirks.com/events/webinar-wednesday-9-1-21.

Quirk's Media will host Webinar Wednesday on **September 29**. Visit quirks.com/events/webinar-wednesday-9-29-21.

GreenBook will hold its 2021 IIEX North America event on **October 5-6** in **Austin**. Visit events.greenbook.org/iiex-north-america.

The Society of Insurance Research will hold its 2021 Annual Conference and Exhibit Fair on **October 17-19** at the Westin Cincinnati in **Cincinnati**. Visit bit.ly/2N0Nz9X.

The Insights Association with hold CRC 2021 on **October 19-21**. Visit www.insightsassociation.org.

The Merlien Institute will hold its 2021 MRMW EU event on **October 20-21** in **Berlin** and online. Visit eu.mrmw.net.

Quirk's Media will host Webinar Wednesday on **October 27**. Visit quirks.com/events/webinar-wednesday-10-27-21.

succeet will hold the in-person pillar of succeet21 on **October 27-28** at the MOC in **Munich**. Visit www.succeet.de.

Informa Connect will hold The Market Research Event (TMRE) on **November 15-17** in **Nashville**. Visit informaconnect.com/tmre.

Event details as of February 15, 2021. 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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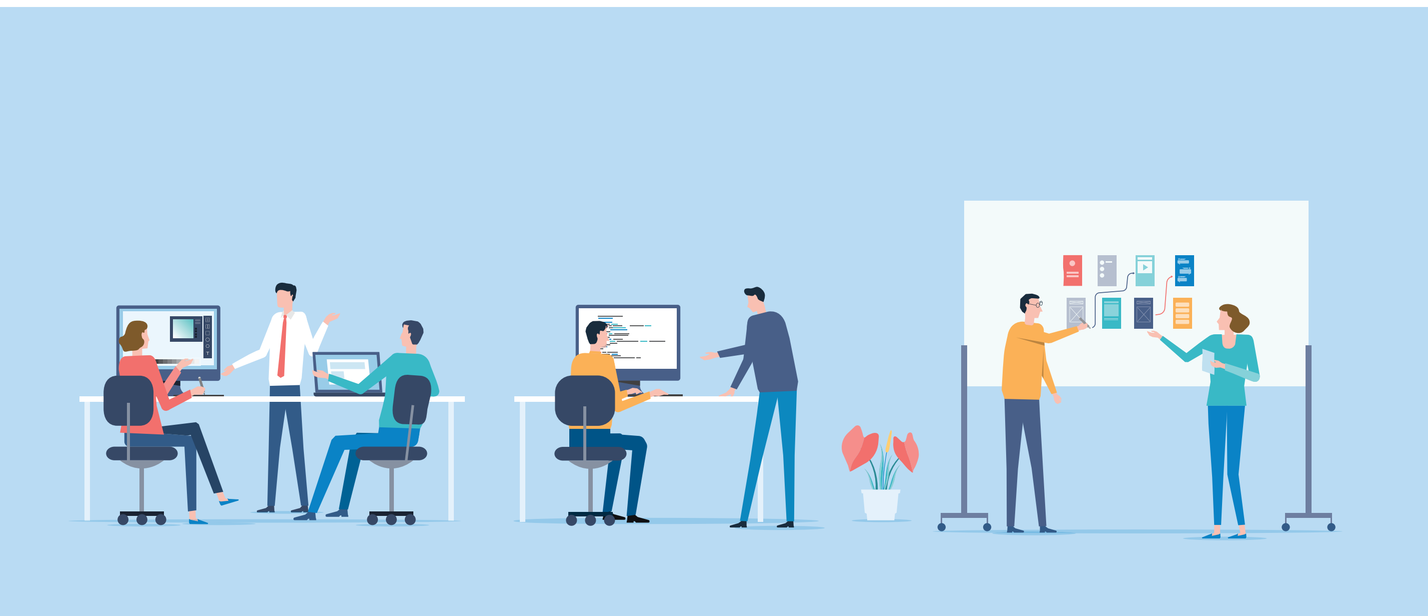

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Founded 1988 | 400+ employees
Mohit Gour, EVP

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Founded 2013 | 20 employees
Naim ul Qadar, Founder and CEO

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Founded 2010 | 45 employees
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Frank Hayden, COO

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Founded 2008 | 50 employees
Paul Bragan, Managing Partner
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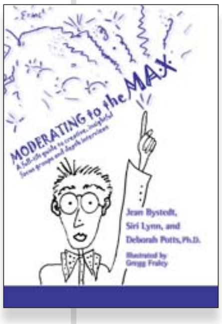

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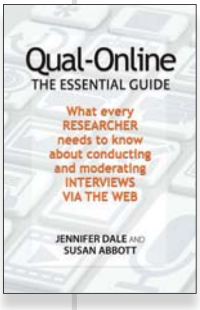

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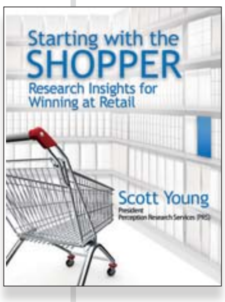

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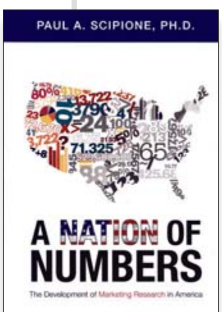

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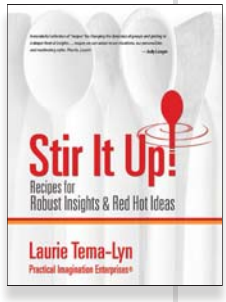

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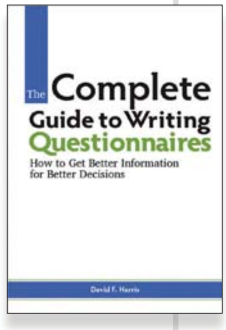

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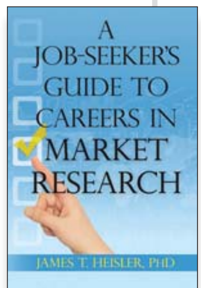

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10 minutes with...

Barry Jennings
Director, Commercial Cloud and Business Planning Insights
Microsoft Research + Insights

"As insights professionals it is critical that we listen well and understand the strategic business questions that need to be solved."

What is the most rewarding part about working within insights at a global organization?

That's an easy one. It's the teamwork aspect for sure. I'm constantly impressed by the power of bringing a broad set of talented folks together to solve a problem.

Our business spans a wide set of technologies, products and services that address the needs of consumers, software developers, IT professionals, business decision makers and end users from all over the world. On an average day, I have a number of people within the team I manage who can share data, deliver insight or can find the most recent point of view we need to address the issue we are tasked to solve, and they work well together to do just that.

Do you have any tips for client-side insight professionals looking to develop strategic partnerships with internal stakeholders?

Three things come to mind when I think about building and nurturing stakeholder partnerships:

- Listen and share.
- Answer the business questions, don't just execute the project.
- Remember you are on the same team.

As insights professionals it is critical that we listen well and understand the strategic business questions that need to be solved. It's equally important that an analyst shares a point of view in these conversations. We often have a broader set of data that we bring to a discussion. Pushing a POV forward might fill in some information gaps and get the team focused on a more precise question that will drive impact rather than simply add more information.

How do you see commercial research and insights changing in the next five years?

I believe it will be critical for insights professionals to be pretty fluent across a broad range of techniques and tools to remain effective. I recently read "Range" by David Epstein, which discusses the value of being more a generalist than a specialist. He referred to two different types of learning environments – some that are kind, where things are fairly clear cut and operate in fairly regular way, and some are wicked, where things tend to be unpredictable, highly evolving, unclear, incomplete and volatile. I think research and insights will have to connect the dots and thrive in a world with lots of disparate data and information sources. That requires skills that allow you to stitch together the abstract and make meaning from it. That's going to be an increasingly sizeable portion of what we will do. What makes it even richer is that we also have access to people across our entire Research + Insights organization who can contribute content, reshape our thinking or even push an alternative perspective that up-levels the insights we create.

Read the full interview at https://bit.ly/3aRt1cLx.