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Quirk's Marketing Research Review
May/June 2021
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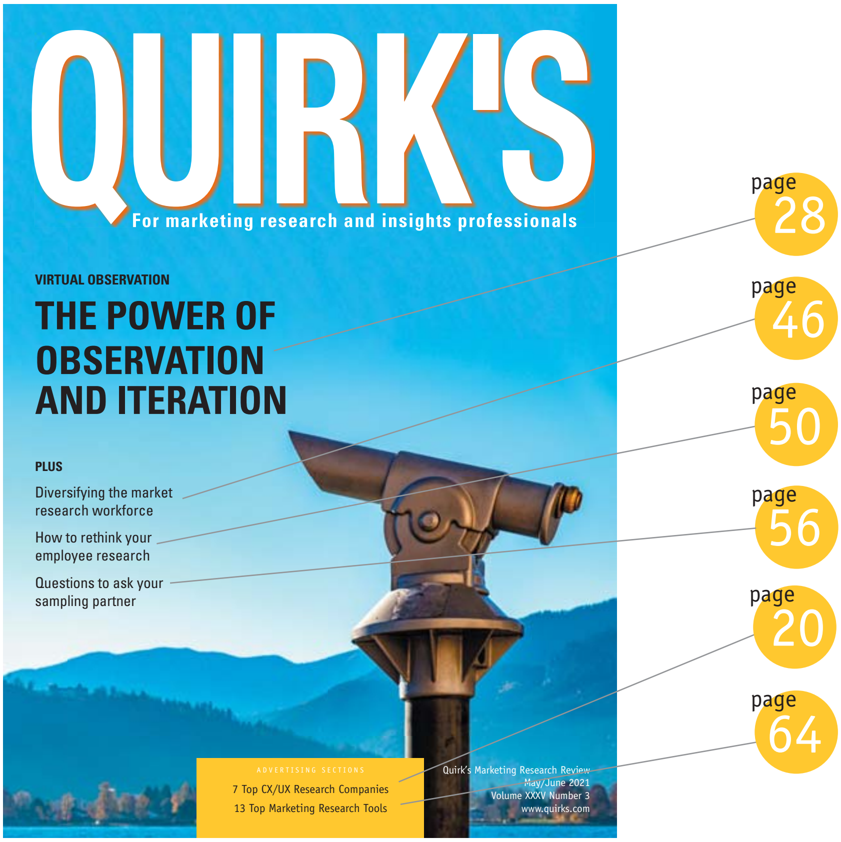
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Quirk's Marketing Research Review
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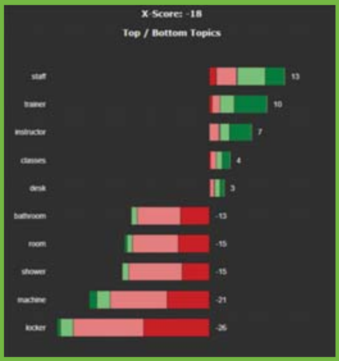

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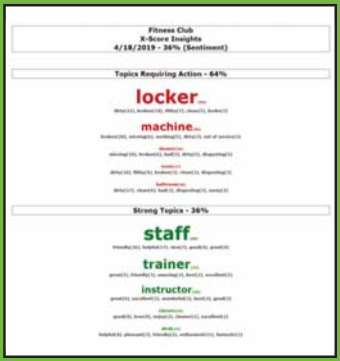

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••• the business of research

Outside affirmation helps build better teams

Looking to bolster the morale of your insights team? Try a little outside positivity. For the paper, "Seeing oneself as a valued contributor: social worth affirmation improves team information sharing," University of Michigan Ross School of Business Professor Julia Lee Cunningham and her co-authors conducted three studies examining the effects of team members receiving affirmation of their social worth from trusted individuals outside the team. The researchers concluded that such encouragement helps team members see themselves as valued contributors and helps overcome their reluctance to offer their perspectives, leading to better information sharing.

"When you join a team, your responsibility is to make the team better by adding unique ideas or perspectives," Cunningham says. "But paradoxically, you may feel unable to do so because you are too concerned with how you are perceived, with 'belonging.'"

Managers can also take advantage of the findings in settings like onboarding sessions and performance reviews. "The way that managers give feedback doesn't always have to be finding room for improvement or focusing on task performance; it can be about the person as well," Cunningham says. "Even in an onboarding exercise, management can help newcomers see themselves as a valued contributor as they get started with the company. Letting someone know that we really care about them as a person, not just as somebody who contributes to the work process, can send a very powerful signal."

••• consumer psychology

Perhaps the UGLI fruit had it right all along

Few marketers would recommend that clients call their products ugly but new research from the University of British Columbia Sauder School of Business shows that when it comes to selling misshapen fruits and vegetables, labeling them as "ugly" can be a recipe for sales success.

For the study, "From waste to taste: how 'ugly' labels can increase purchase of unattractive produce," the researchers conducted seven studies that tested the efficacy of describing the unattractive produce as "ugly" by having participants purchase produce at a farmers market and online and by examining people's preconceptions about misshapen foods.

While the researchers found that consumers expected the imperfect produce to be less tasty and even less nutritious than more traditionally attractive foods, they also found that when the produce is labeled "ugly," consumer hesitancy disappears – and not because of humor or originality. Calling items "ugly" signals to consumers that the only difference between items is aesthetic, which makes them aware of their bias and significantly increases their willingness to buy the less attractive produce.

The researchers also found that "ugly" labeling is more effective than other popular labels, such as "imperfect," at driving choice of unattractive produce and generating click-throughs in online ads.

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By Joseph Rydholm, Quirk's Editor

New book offers guidance for corporate insight teams

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Joe Rydholm can be reached at joe@quirks.com

If you've attended any of our Quirk's events in recent years, either virtual or in-person, or consumed any of our content, you're probably familiar with the work of James Wycherley and the U.K.-based Insight Management Academy (IMA).

We've been happy to partner with Wycherley and the IMA as we share their goal of elevating the corporate insights function. The articles he has written and Quirk's Event sessions in which he interviews client-side insights leaders are always popular. (I recapped two such chats in a recent issue of our e-newsletter: https://bit.ly/3mpWZsx.)

Following a decade in insights at Barclays Bank, Wycherley became the IMA's chief executive in 2015 and took up the organization's mission of helping client-side researchers gather together to learn, benchmark and strategize ways to improve their organizations' research functions. As a natural extension of the work he and the IMA have been doing, Wycherley has written a book, Transforming Insight, in which he compiles the "42 secrets" of successful corporate insight teams.

The book is organized in five sections – identifying value; driving change; leading insight; optimizing impact; and moving forward – consisting of concise but substantive chapters. Some topics – like how to develop a plan for the future of the research function within your organization or how to write your function's mission statement – could warrant many more pages than they are given here but Wycherley does a great job of giving anyone contemplating such major undertakings a solid foundation of questions to ponder at the outset and guideposts to use along the way.

It's an admirably realistic and aware book that shows an understanding of the current, sometimes messy realities of the modern insights function while also striving for attainable future efficiencies rather than the only-in-a-perfect-world goals that many business books urge readers to pursue. He acknowledges that researchers have accomplished a lot in terms of raising the discipline's status and profile and that now is a great time to be in the industry but there is also more that can be done.

Client-side readers will no doubt find themselves nodding in agreement throughout, as the book is clearly based on and drawn from the work experiences of IMA members, who have gathered together in regular forums since IMA's founding in 2004.

A primary target of the book is, of course, the leaders of the insights departments or functions and in addition to the coverage of the many aspects of being a researcher in general there is also much of interest to those who want to think about their roles as managers of groups of people and stewards of internal information-gathering.

In later chapters he makes a case for optimizing the impact of the research function by understanding its role in how the organization makes money:

"Working in an Insight team it can often be tempting to think that the commercial aspects of a business are somebody else's concern. We construct a view of the world which separates the commercial from the customer. This means that the idea of researchers and analysts being commercial feels akin to putting on somebody else's uniform or accepting a different mind-set. Not only do we think of rational reasons for rejecting the idea, some of us might feel an emotional reaction, maybe even recoil from the suggestion that we have to accept another department's motives and values. But an organization cannot be considered commercial, let alone achieve sustainable commercial success, without understanding the customer, its own operations and the financial transactions between a customer and supplier. And so the learning developed by an Insight team is just as integral to the whole concept of commerciality as the spreadsheets kept by finance or the operational processes developed by product, sourcing, marketing and sales teams."

That type of clear-eyed viewpoint is characteristic of the grounded, informative approach throughout that I think makes Transforming Insight a worthwhile read for corporate researchers.

Transforming Insight (£17.99), by James Wycherley, is available from Transforming-Insight.com.

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••• public opinion

Past the pandemic

Americans eager to resume activities

With many states lifting coronavirus restrictions and vaccinations becoming more widely available, Americans are looking forward to life after the pandemic. In a recent article, Chris Jackson and Mallory Newall of Ipsos explored new research on what Americans are most excited to do once conditions are appropriate.

Americans are ready for an end to coronavirus restrictions and the ability to see those outside of their household. The most anticipated event is not having to think about coronavirus or social distancing, with 74% of respondents agreeing, and 72% percent of Americans look forward to not having to wear masks in public anymore. Americans are excited to see their family and friends, too, with over 60% saying they look forward to meeting with friends and family outside of their household and having dinner in restaurants with their friends.

With only 7% of Americans currently going on holiday trips and 15% going on day trips, it's not surprising that 56% percent are looking forward to resuming these activities. Around half of Americans are looking forward to going to parties such as birthdays or weddings (56%), bars or restaurants (52%), indoor cinemas or theaters (52%) and large public gatherings such as sporting or music events (50%).

Respondents are ready for their kids to get back to usual activities, with half of Americans with children looking forward to sending their kids back to school – though another 16% report that their child or children are already attending school in-person. Missed opportunities from the pandemic have affected everyone and 52% percent of Americans with children say they're excited to take their kids to visit their grandparents again.

Although respondents are ready to get back to the activities and people they've missed, these feelings are more complicated in regard to the workplace. Among Americans who are currently employed, less than 40% are excited about seeing their work colleagues in person (38%), getting dressed in smart or stylish clothes (38%) and commuting to and from their place of work (27%). Much of this lack of excitement comes from the fact that many Americans are already doing these activities. Thirty-five percent say they are already commuting to and from their place of work, while 28% say they already see their work colleagues in person.

The study was conducted by Ipsos between March 2-3, 2021, and surveyed 1,005 U.S. adults.

••• employment research

The travails of remote work

U.K. freelancers feel effects of pandemic across industries

In 2020, the traditional freelancer lifestyle of remote-working became a requirement, as employees from around the world were required to work from home. Worksome polled 1,202 U.K. freelancers whose jobs were divided roughly between design, photo and video (22.3%); IT, software and data (24.9%); sales and marketing (16.3%); and communication (8.1%) to learn more about how the pandemic has impacted freelancing.

While many of the survey respondents were already freelancing prior to the pandemic, 21.4% began freelancing during COVID-19. Ninety-five percent

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of those who began freelancing during that time said that COVID-19 had an impact on their decision to start, either because it provided for a wider range of jobs in different locations or because theirs positions were made redundant.

Though 57% of survey respondents had a positive experience while working in 2020, 43% were negatively affected. Those who had positive experiences contributed this to either an increase in freelance/contractor roles available or the global shift to remote work. On the flip side, those who had a negative experience contributed it to either an increase in competition and difficulty when finding a role or less freelance job availability. The experience varied across industries, with the most positive response seen from sales and marketing (66.7%) and HR/administration (66.7%) and the least positive response seen from design, photo and video (58.7%). The pandemic's effects on freelance job availability was remarkably split as well. Of those who saw a difference, 50.7% saw an increase in job availability while 49.3% saw a decrease.

Most freelancers found the transition to remote work straightforward, with 74% of survey respondents saying it was easy to work remotely. Others found it challenging, with 19% reporting that they missed the face-to-face interaction that happened in the office as well as the opportunities for brainstorming and creativity. Forty-one percent of survey respondents found that their productivity levels were unaffected by working remotely, while 32.8% felt they were actually more productive, as they spent less time commuting and going to meetings. Many (74.5%) even felt happier working as a freelancer than a permanent employee.

However, the pandemic still presented similar challenges to freelancers as it did to permanent positions. Sixty-four percent of survey respondents said they earned less than usual during COVID-19 and 71.4% of freelancers experienced cancellations or delays due to the pandemic. Many (67.2%) of freelancers surveyed didn't think the government did enough to support them during the pandemic and 25.3% needed to make claims with the Self-Employed Income Support Scheme. Of those who made claims, 67.2% felt it was not enough to support them through a period of unemployment.

Ultimately, 82% of freelancers surveyed plan to continue working as a freelancer or independent contractor after COVID-19 ends.

The study surveyed 1,202 respondents across the U.K. from November 11, 2020, to January 17, 2021.

••• consumer research

Making adjustments

Study shows new purchasing habits in cooking, cleaning

Throughout the pandemic, consumer actions and attitudes have seen frequent and surprising changes. In an effort to understand how consumer habits have shifted in the U.S. one year into the COVID-19 pandemic, NCSolutions polled more than 2,000 Americans about their current living and shopping habits.

Since the start of the pandemic, Americans have made it a top priority to clean and disinfect their homes as a way of preventing the spread of the virus. Nearly all respondents (96%) say they spend the same (55%) or more time (41%) cleaning now than pre-pandemic. In terms of how much they spend for products for cleaning and disinfecting their homes, 89% say they spent the same (54%) or more (35%) since the pandemic began. Notably, almost a third of consumers (32%) say they have no plans to go back to their pre-pandemic rates of cleaning. Purchase data supports this consumer sentiment. Spending on cleaning products is up 36% year-over-year (March 2020 through February 2021) compared to the same period a year prior. The increase is more than in any other grocery category.

Consumers also indicate they're placing a high priority on maintaining physical health. Eating healthy foods is one way that 47% of survey respondents say they've taken care of themselves during the pandemic and 38% say they're regularly exercising. A significant number of respondents are following expert guidelines. Eight in 10 consumers report wearing masks, three-quarters of respondents practice social distancing and more than half (55%) say they take vitamins and supplements. These behaviors carry over into how and where consumers shop for groceries. Forty-two percent of consumers say they visit the grocery store so they can get out of the house and feel normal. On the other hand, more than one in four consumers say they find in-person shopping at the grocery store to be stressful. No matter where they shop, Americans are adding healthy food and supplements to their baskets. Spending on fresh produce is up 24% compared to the year prior and purchases of vitamins and supplements are up 21% year-over-year.

More than half of Americans (56%) don't believe the pandemic will subside until 2022 or later, while a resounding 80% are optimistic about the post-vaccine environment. Looking forward to the spring and summer, 41% of consumers say they plan to drive to destinations away from home, while 38% say they plan to have outdoor social gatherings. One in three (34%) Americans plan to eat out more at restaurants. However, only 30% say they plan to visit public venues. Regardless of plans to resume normal outings, cooking at home is now a staple of the American diet.

Almost half (47%) of respondents say they cook more frequently now than before the pandemic. Frozen foods (29%), staples such as dry grains and beans (28%) and baking ingredients (27%) were the food categories with the highest growth during the pandemic. Many of these high-growth categories reflected the need to keep pantries stocked and to support more cooking at home.

The top 10 food and household items Americans say they must always have a supply of in their homes include cleaning supplies (81%), which ranked number one. But six other items related to managing physical and emotional health were also deemed necessary. These include health care items such as painkillers and thermometers (63%); proteins such as chicken, fish and eggs (63%); fresh fruits and vegetables (63%); snack foods (58%); baking ingredients (55%); and vitamins and supplements (54%).

Snacking while engaging in entertainment options is another way Americans are coping while being more homebound. Ninety-one percent of Americans say they snack while watching TV or while doing other forms of home entertainment and 67% say they snack while enjoying other forms of entertainment.

Home entertainment played an important role as an emotional healer during the pandemic – 69% of Americans say watching television and movies is the top activity they engage in to take care of themselves emotionally since the start of the pandemic. Americans are leaning into media as a coping source, with 33% of Americans using social media more and 28% reading more magazines and books.

The study was fielded by NCSolutions from February 26 – March 2, 2021, and polled 2,017 U.S. adults.

••• health and beauty

The new perfumer

Study examines shifts in beauty buying behavior

Beauty habits are constantly evolving. But this process has been especially apparent through the COVID-19 pandemic – as Americans donned masks and avoided public gatherings, we grappled with "mascne" and debated wearing makeup to company Zoom meetings. And when we did buy new beauty products, we started doing it the same way we shopped for many other things – online.

Research from PowerReviews revealed that 54% of beauty buyers say they wear less makeup than before the pandemic and 56% say they focus more on skincare. And they're not just wearing less – they're spending less too. Forty-one percent say they spend less overall on beauty products than before COVID-19. However, 21% says they actually spend more and another 38% report that their spending has stayed the same. The likelihood to spend more on beauty products increases in line with household income; 24% of those whose households make more than $100,000 claim they spend more than before the pandemic.

The beauty category has also experienced the shift to online that many other categories saw. Eighty-seven percent say they spend more or the same online than before COVID-19, again with the highest income bracket more likely to spend online. About half (49%) say they now spend more than $50 online on beauty products, compared to 16% when asked this same question in 2019. However, in-store beauty spending at this level has also increased. Forty-one percent say they now spend more than $50 in store, compared to 21% in 2019, and 55% also say they use curbside pick-up more than before the pandemic.

It's possible that the pandemic and the previous year have shifted the desire to stick with familiar brands as well. Forty percent say they are more likely now than pre-pandemic to buy products they haven't tried before and 57% of shoppers say that they had never tried more of a quarter of the beauty products they bought online in 2020 – meaning that these were first-time purchases. Additionally, 76% of respondents are focusing on buying products that are sustainably made and 50% are actively seeking out products made by Black-owned beauty brands.

With the shift to online, many beauty shoppers likely benefit from the ease with which product ratings are accessible. In fact, 99% always or sometimes read ratings and reviews when shopping for beauty products online, while this figure for in-store shoppers is 85%. Seventy-nine percent focus on average star rating, 58% care about overall volume of reviews and 49% say they look for recent review content. Forty-one percent say they rely on reviews more than they did pre-COVID-19. This is most prominently the case among younger generations, with 58% of Gen Z claiming this to be the case. User-generated imagery and video is also key, with 38% saying it's more important than before the pandemic – again this figure is highest among Gen Z at 53%.

The study was conducted by PowerReviews and polled more than 10,000 U.S. beauty consumers in January 2021.

••• real estate research

Burning to buy

Report reveals homebuying trends from the past year

The popularity of multigenerational homes increased over the last year, as a rising number of homebuyers purchased larger residences compared to prior years, including Millennials who continue to make up the largest share of homebuyers at 37%.

According to the National Association of Realtors' (NAR) 2021 Home Buyer and Seller Generational Trends report, which draws from survey data from a 12-month period ending in July 2020, Millennials have been the largest share of buyers since NAR's 2014 report. The most recent data shows that 82% of younger millennials and 48% of older Millennials were first-time homebuyers, more than other age groups.

According to the study, during the last year, 18% of homebuyers between the ages of 41 to 65 purchased a multigenerational home – a home that will house adult siblings, adult children, parents or grandparents. Homebuyers ages 75 to 95 were the second most likely to purchase a multigenerational home and were most likely to purchase senior-related housing, at 27%.

With inventory levels being alarmingly low in recent years and even dropping to record-low levels last year, a number of would-be homebuyers consequently had difficulties finding adequate housing options. Nearly six in 10 homebuyers between the ages of 22 to 40 said just finding the right property was the most challenging step in the buying process and more than half of all homebuyers (53%) said the same.

Twenty-eight percent of homebuyers between the ages of 22 to 30 lived with parents, relatives or friends before purchasing – higher than any other generation. Living with family first tends to allow flexibility toward saving for a down payment and finding a home, given the low housing inventory. Twenty percent of homebuyers between the ages of 22 to 30 were unmarried, a decline from 21% from a year ago. Additionally, 22% of homebuyers between the ages of 66 and 74 were single women.

In terms of buyer characteristics, 19% of older Baby Boomers – buyers between the ages of 66 and 74 – and 18% of Generation X – buyers ages 41 to 55 – were most likely to purchase a new home to prevent having to do renovations or avoid plumbing or electricity problems. These buyers prioritized having the ability to choose and customize design features.

Seventeen percent of buyers who are part of the Silent Generation – those between the ages of 75 to 95 – purchased newly-built homes. These buyers were least likely to compromise in their home search and least likely to purchase a detached single-family home.

As is always the case in real estate, location proved to be an important component among buyers. Fifty-four percent of homes purchased by homebuyers ages 31 to 40 were located in a suburb or subdivision. Out of this age group, 69% said the quality of the neighborhood influenced their neighborhood selection. That sentiment was shared by buyers ages 22 to 30 to the tune of 65%. However, an even stronger factor among this age bracket was "convenience to workplace," as 74% cited that when deciding on a neighborhood, proximity to where they worked was imperative.

Older Boomers (35%) and the Silent Generation (36%) also valued their neighborhood being close to areas in which they could shop and both groups (28% and 31%, respectively) stated that proximity or convenience to a health care facility was an influential factor in choosing a neighborhood.

Among all sellers, the most commonly cited reason for wanting to sell their residence was a desire to move closer to friends and family (15%), followed by the home being too small (14%) and a change in family situation (12%).

In the midst of the pandemic, the usefulness of virtual tours skyrocketed, especially among 22- to 40-year-old buyers. Out of all buyers, 88% cited a real estate agent as an information source they used during their home search but that share rises to 91% among younger Millennial buyers ages 22 to 30. Two percent of all buyers and sellers were from Generation Z.

Buyers from all generations – more than half (51%) – primarily wanted their agent's help to find the right home to buy. Homebuyers also called on agents to help with brokering the terms of their sale and to aid with price negotiations. According to the NAR report, the oldest and youngest age groups, those 66 and older, as well as those ages 22 to 30, were more likely to want their agent's assistance with paperwork. In terms of selling and consistent across all age groups, nine in 10 home sellers worked with an agent to sell their home.

The largest share of all home sellers was Baby Boomers at 43%. Sellers aged 55 and younger often upgraded to a larger and more expensive home while staying relatively close to their prior home. Sellers 56 years and older regularly purchased a home that was similar in size but less expensive than the home they sold by moving farther away.

Overall, sellers stayed in their previous home for a median of 10 years before selling, with a median of six years among sellers ages 31 to 40 and a median of 16 years among sellers 66 and older. Recently sold homes were generally on the market for a median of three weeks.

The survey was conducted by the National Association of Realtors from July 2019 to July 2020 and polled 8,212 primary residence buyers.

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Stat tests: what they are, what they aren't and how to use them

| By Steven Millman

snapshot

Steven Millman explores five ways that researchers and marketers misinterpret tests of statistical significance.

One of the most ubiquitous tools in the researcher's toolkit is the test of statistical significance, more commonly known as the stat test. Stat tests are used in market research along with virtually every scientific discipline, showing up wherever one needs to know how to interpret their results. It's a powerful and flexible methodology when properly used but it's also one of the most abused and poorly understood metrics in our industry. In this article, I'll be discussing what tests of statistical significance are, what they really mean, how they are commonly misused and how to use them correctly for maximum value in your research. I've kept this article intentionally free of too much math to make it more widely accessible to a broad audience of practitioners.

How confident they should be

At the most basic level, a stat test is a form of hypothesis testing that serves to help a researcher determine how confident they should be about whether two numbers are different. Those numbers could be the difference in brand awareness between advertising-exposed and -unexposed individuals, the market share of different brands or whether sales have changed over time. In regression methodology, where we are investigating for signs of a causal relationship, the difference is between zero (no effect) and the rate of increase or decrease (slope) of the effect measured. Where we are confident differences exist, we feel more comfortable about making inferences about those relationships leading to data-driven decision making.

Because true census data are rare in market research, we rely on the examination of subsets of data in order to generalize to a population we cannot directly observe. It is not possible, of course, to ask every consumer in the United States for their opinion on a particular brand. Practical constraints such as time, cost, incomplete contact information and the like limit the number of persons who can be interviewed. Proper sampling techniques allow for the effective use of relatively small groups of representative individuals to help us understand the population of interest to us within a certain margin of error. Even in the hypothetical where we could ask everyone, there would still be measurement error. There will be individuals who refuse to answer, who are not yet sure, who will change their mind prior to a purchase decision or who will simply lie to the investigator. Investigators themselves are human and thus prone to error.

Stat testing helps us wade through these uncertain and messy collections of data to make sense of what might really be going on in the world. Along with a wide variety of other techniques (such as random sampling, weighting, non-response bias testing, etc.), these tests guide us with respect to what extent we ought to draw inferences from our data. If the difference or effect is statistically significant, we feel more comfortable saying that the result is a function of some systematic underlying phenomena – such as the advertising being effective at increasing

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awareness – rather than from a random process such as sample selection. If the stat test does not show a significant result, we view the relationship with skepticism.

Five categories of error

In practice, despite how common stat testing is in our industry, many people with the best of intentions set up or interpret these tests incorrectly. Over the last 20 years or so, I've found that most of these errors fall into one (or more) of five categories: misinterpretation of confidence levels; sample size; robustness; using the correct stat test; and overreliance on simplified tools.

Let's consider them one by one.

Misinterpretation of confidence levels. One of the most important things to remember in stat testing is that the level of confidence used is arbitrary and selected by the researcher based on their needs. To properly interpret confidence levels, one first needs to understand the p-value, one of the key metrics stat testing produces. The p-value is a number between zero and one that indicates the probability that the result of the test is at least as extreme as the results found in relation to a hypothesis of no difference. That's a mouthful. In simpler terms, the larger the p-value, the more likely that your results are caused by a real effect and not randomness. A p-value of 0.95, for example, means that the result found is more unlikely to be the result of randomness than 95% of the range of possible values. Another way to think about this is that at the 95% confidence level you are willing to accept about a 5% risk of being wrong about your inference. That's not precisely how the math works but it's a reasonable rule of thumb for thinking about it. The higher the confidence level, the more conservative the test is. In market research a 90% confidence level is generally typical for small-sample studies like most survey research. For larger data sets such as point-of-sale data, a 95% confidence level is more common.

A common mistake people make with confidence levels is that they accept levels of confidence too low for reasonable decision-making. Most statisticians and social scientists use the 95% confidence level and will begrudgingly accept a 90% confidence level in cases of small sample size. In market research, where 90% is generally the industry standard for survey work, it isn't uncommon to see a result which is only significant at the 80% confidence level treated as though it constitutes some kind of trustworthy result. Consider for a moment what a result with a p-value of 0.80 really means. What that stat test result is telling the researcher is that about 20% of the possible values of the results are more likely to suggest a real relationship than the result that was actually found. At the 90% confidence level you're willing to accept about a one-in-10 chance of being wrong about the nature of the relationship (again, not exactly how the math works but close). Should a researcher recommend making a large media investment or change in strategy based on a one-in-five chance of being wrong about the legitimacy of the result? It's probably best to wait and get more data so that decisions can be made with clearer vision. I've even been asked for 70% confidence levels – at that point one may as well throw darts.

Because confidence levels are arbitrary by nature, it's important to also remember that in a test with a 90% confidence level there's no real difference between a result with a p-value of 0.899 and another with a p-value of 0.901. Looking at stat testing as a simple binary choice has become a bit of a crutch for some researchers who may never look at the underlying data. Researchers should always look at the p-values for this additional context and consumers of research should never feel shy about asking for them from their vendors.

Finally, because stat tests are about confidence in relationships between variables we cannot directly observe, sometimes – out of sheer randomness – a stat test gives the wrong result altogether. These errors become rarer as the confidence level is set higher and sample size gets larger but can happen in any research regardless of sample size or how conservative the testing. These fallacious results need not be the result of any kind of mistake made in the research design or collection; it's simply the case that given enough random trials every possible event, no matter how unlikely, is probable to occur. In simpler terms, weird stuff happens all the time. For instance, in a real-world example from my own life, about two-and-a-half years ago my son and I both broke the exact same bone in our foot about two hours apart on the same day in completely unrelated accidents. If that can happen, anything can happen. In statistics, you'll hear these kinds of errors described as Type I and Type II errors. A Type I error is a false positive in which the test leads you to conclude there is a real difference between groups when there is none and a Type II error is a false negative in which the test leads you to believe there is no difference between groups where one actually exists. Type I and Type II errors are often the cause when bizarre results occur, such as ad exposure causing a statistically significant decline in awareness. Be particularly cautious about interpretation at small sample sizes where these kinds of errors become more common.

Sample size. There is a direct relationship between sample size and the sensitivity of a stat test. The larger the sample size, the more likely you are to see a positive test of statistical significance where a relationship actually exists. Conversely, the smaller the sample size, the less likely to find evidence of a statistical relationship. It is important to note that this relationship between sample size and test sensitivity is not linear. In low-sample studies, even small increases in sample will have substantial improvements in sensitivity whereas for very large-sample studies marginal gains in sensitivity take a lot more effort. As an example, a presidential approval poll with 100 respondents will have a margin of error of about +/- 10 points at the 95% confidence level. Doubling that to 200 respondents reduces the margin of error to about +/- 7 points. Compare that to a sample of 1,000 respondents at about +/- 3.1 points which improves by less than a point (+/- 2.2 points) when doubled to 2,000 respondents.

I mentioned earlier that it's not a great idea to make too much of a stat test at the 80% confidence level but there's one exception to this advice. When there's very low sample size and a large effect but the p-value doesn't quite reach a 0.9, one could infer that given more sample a statistically valid relationship might emerge. That doesn't mean it will, of course, but taken together these facts would suggest that the negative stat test should not necessarily be taken at face value.

Robustness. Another important consideration in stat testing that is often overlooked is the robustness of the results. If you see a statistically significant lift in purchase intent for the entire population that you're studying, a lift in purchase intent for both men and women individually and for every age group except 35-55, a good researcher will look at that p-value for more context. If the p-value is close but does not quite reach statistical significance, there's a strong chance that this age cut represents a systematic, non-random relationship as well despite failing the stat test. Similarly, if you have a result where the overall ad campaign shows no lift, nor among any subgroup but one, a smart researcher should be cautious reading anything into that result. A robust result repeats itself over different cuts of the data and across time periods and thinking properly about robustness allows you to better identify Type I and Type II errors in your data. Always try to look at your results as part of the larger picture to better understand each of the individual elements and keep sample size in mind as described earlier. Narrower cuts of data naturally rely on considerably smaller sample sizes.

Using the correct stat test. Stat tests come in a variety of forms depending on the kind of data being used and the kind of relationship being evaluated. It's generally best to consult with a statistician to ensure you're using the right one but one particularly common mistake is making the wrong choice when selecting a one-tailed test vs. a two-tailed test. A two-tailed test should be chosen when the relationship being measured could be positive or negative. Most independent means tests, like A/B testing or advertising effectiveness, can be either significantly higher or lower than their point of comparison. Other kinds of relationships may only be relevant in one direction, for example the effectiveness of a painkiller in stopping a headache. In market research, advertising might have a positive or negative impact on brand favorability based on the quality of the creative but can only have a non-negative impact on awareness. It's difficult to imagine an ad so confusing or hypnotic that it would be capable of making a consumer forget a brand they used to know. Using the wrong test has implications for correctly evaluating significance.

Overreliance on simplified tools. There are many available free online calculators for stat-testing out there and they can be handy for understanding how sample size and confidence levels may impact hypothesis-testing but they can't be used as a replacement for a proper statistical test that considers all of the various complications. Online calculators generally make a series of assumptions to simplify the equations which will often be incompatible with your data. They do not take into account some vital influences on stat testing, including the effect of sample weighting, which changes the effective base sizes, or extreme values. Stat testing behaves quite differently when the probabilities are either very low or very high such as awareness for a new brand (near zero) versus a well-known brand like Pepsi (>95%). The underlying distribution of the data can also have substantial impact on the accuracy of results. You get what you pay for, as they say, and you probably shouldn't commit to changes in a substantial media buy based on the results of a free app.

Become more fluent

Stat testing is a powerful tool in market research and as the availability of data continues its exponential growth, it's more important than ever for professionals in our industry to become more fluent in its use. As an advisor to university market research programs, I have for years encouraged the development of more robust instruction on the interpretation of statistics for everyone in a marketing program, not just the market researchers, for exactly this reason. While most will never need to conduct such a test, everyone in the advertising and marketing ecosystem will need to be able to interpret these kinds of results at some point in their careers. Understanding what stat testing means (and doesn't mean) is especially critical for senior leaders and other decision makers because of the impact on ROI and the success of their endeavors. A famous quote, attributed to Scottish poet and anthropologist Andrew Lang, says that some people "use statistics like a drunk man uses a lamppost – more for support than illumination." We should all be striving to illuminate and a clearer understanding of stat testing is an important step towards that goal.

Steven Millman is senior vice president, research and operations, with research firm Dynata. He can be reached at steven.millman@dynata.com.

••• qualitative research

Watch and learn

The power of (virtual) observation and iteration

| By Tom Donnelly, Jason Mandelbaum and Hiba Rahman-Vyas

snapshot

Health care case studies illustrate the value of virtual methods of observational research.

This past year has been a challenging one for conducting research in person. While many types of projects have been successfully converted to virtual approaches with relative ease, observational research and hands-on work with medical devices and technology have proven to be more difficult. In this article we will: discuss traditional observational research approaches; mention the standard web-assisted telephone interview approach; detail advantages and disadvantages of three virtual observational approaches; and review two case studies: home health infusions and preparing/administering IV chemo. In our conclusion, we reflect on the need for observational research, point out the strengths of conducting research in phases and provide tips for success.

Emphasis on observation

When designing a new medical device or modifying an existing one, observational research is used to observe workflows, workarounds and unmet needs. In market research, we may use the term ethnographic research, while in human factors we may call it contextual inquiry (CI). Regardless of what you call the approach, the idea is to watch health care practitioners or patients using the medical device. Using an observer-as-participant approach,[1] there is an emphasis on observation, interjecting questions as needed for better understanding, as compared to active moderation during the use.

Trained medical moderators enter a medical environment – such as a hospital, an ambulatory surgery center or a pharmacy – to follow and observe medical personnel performing the procedures of interest. When the device is self-administered, patients are observed to better understand how they use their medical device. Moderators go to the patients' homes to watch them administer their own treatments. In both settings, researchers video-record, take pictures, use handwritten notes to capture critical steps in device use, determine workflows and

examine the environment of use. Analyses are conducted using various types of data, such as careful observation of the videos showing how the end user holds and manipulates the device, self-reported data and the moderator's observational notes.

Web-assisted telephone interviews (WATIs) are the backbone of virtual qualitative market research and almost all readers are already using this kind of approach. However, here is a short review to set the stage for discussing virtual approaches. As the name suggests, respondents are interviewed by the moderator while viewing a stimulus on a computer (or tablet). In some cases, respondents and/or moderators are using their webcam, which allows for viewing facial expressions.

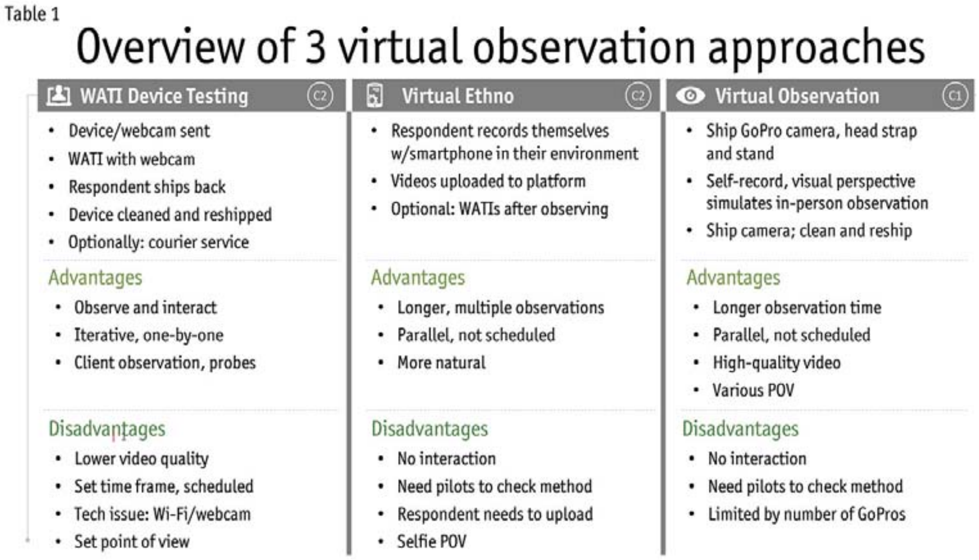


Table 1

Overview of 3 virtual observation approaches

WATI Device Testing (C2)	Virtual Ethno (C2)	Virtual Observation (C1)
• Device/webcam sent • WATI with webcam • Respondent ships back • Device cleaned and reshipped • Optionally: courier service	• Respondent records themselves w/smartphone in their environment • Videos uploaded to platform • Optional: WATIs after observing	• Ship GoPro camera, head strap and stand • Self-record, visual perspective simulates in-person observation • Ship camera; clean and reship
Advantages	**Advantages**	**Advantages**
• Observe and interact • Iterative, one-by-one • Client observation, probes	• Longer, multiple observations • Parallel, not scheduled • More natural	• Longer observation time • Parallel, not scheduled • High-quality video • Various POV
Disadvantages	**Disadvantages**	**Disadvantages**
• Lower video quality • Set time frame, scheduled • Tech issue: Wi-Fi/webcam • Set point of view	• No interaction • Need pilots to check method • Respondent needs to upload • Selfie POV	• No interaction • Need pilots to check method • Limited by number of GoPros

Depending on the platform, additional ways of communicating and collecting data can be incorporated. For example, if there are multiple respondents, they can individually provide ratings or open-ended responses such that the moderator can see their responses but their fellow respondents cannot. You could also have people mark-up stimuli individually, as well as collaborate on a white board. Some platforms provide a virtual backroom with a chat function where the moderator can chat live with their clients without respondents seeing the discussion.

Virtual observational approaches: pros and cons

Virtual approaches have been successfully used for various types of research projects but less so for observation and device testing research. The advantages and disadvantages of three approaches are described: WATI device testing, virtual ethnography and virtual observation. The right corner of each column in Table 1 denotes which approach was used for the two case studies (C1 or C2).

WATI device testing

This approach uses the standard WATI platform to observe use of devices sent to the respondent. You may need to send the respondent a webcam in addition to the device to be tested. After the device testing is complete, the respondent ships it back to the researcher so that it can be sanitized for use by another respondent. In our case study, we found it cost- and time-efficient to use a courier service in two metropolitan areas. The courier was shipped the prototype, disposables and a webcam. Before each scheduled interview, a box was dropped off for the respondent. After each interview, the box was picked up. The prototype and webcam

Figure 1

Case study 1: Home Health Infusion Examples of observational learnings

Phase 1 WATIs	Phase 2 Virtual Observation
• Patients note the portability of some infusion devices as a significant benefit	• Patients note discomfort moving around while infusing, generally sit and wait it out
• No mention of PPE	• Difficulty using equipment while wearing PPE
• No difficulty with tourniquets noted	• Tying tourniquets single-handedly is tricky
• No mention of port-related difficulties	• Patients with a chest ports have self-administration difficulties/possible neck strain
• Nurses do not report priming issues	• Nurses prime tubing into bags or packaging
	• Weaker patients have difficulty opening packaging and disconnecting components

Nurses wear GoPros on head straps to record the procedure from their point of view

were sanitized and the disposables were refreshed before delivering them to the next respondent.

There are some advantages to the WATI approach. The moderator can observe the device use while interacting with the respondent. It allows clients to watch and interact with the moderator. The moderator can provide live instructions and probe where desired. The approach is often iterative, so that learnings from earlier interviews can benefit the approach in subsequent interviews.

There are also some disadvantages to this approach. There is a lower video quality versus what can be captured with traditional video equipment. By the nature of this approach, it is a scheduled set time for the interview. You can run into technical issues with Wi-Fi and webcams. Another downside is there is a set point of view for where the webcam is located.

Virtual ethnography

Another approach can be called virtual ethnography, where respondents record themselves, typically with a smartphone, while they discuss their condition and show the use of their device. The videos are then uploaded to a platform. An optional add-on is the use of WATIs to get context with follow-up questions.

There are some advantages of this approach. You have the ability for much longer observations and multiple observations over time. The research can be done in parallel with many respondents at once. Another important advantage is that the observation is more natural since it is done in respondents' own environments, on their own schedules.

There are some disadvantages. For example, there is no interaction between the moderator and the respondents. This leads to the need for pilots to check the method and make sure everything in the process is working smoothly before fully launching field. Also, respondents are responsible for uploading their videos, which can pose a challenge and require the researcher to follow up. And finally, the point of view is often that of a selfie, which may or may not be problematic. The use of a smartphone stand can alleviate this issue.

Virtual observation

The third approach can be called virtual observation. In this case, the researcher ships a recording device, such as a GoPro camera, to respondents. You can provide the option of using a head strap or a stand. As with the prior approach, respondents are recording themselves but the visual perspective could more closely simulate in-person observation or the perspective of the user. After respondents finish the research, they ship back the recording device, the video is downloaded, the device gets sanitized and shipped to another respondent.

There are some advantages. As with the last approach, you can have a longer observation time and the research can occur in parallel with multiple respondents. An important advantage is the high-quality video. In addition, you can have multiple points of view because of the use of the stand or head strap.

One of the disadvantages is similar to the last approach: you cannot interact with the respondent. This means you need to conduct pilots to check the method. Another disadvantage is that you are limited by the number of recording devices that you have available, in our case GoPro cameras.

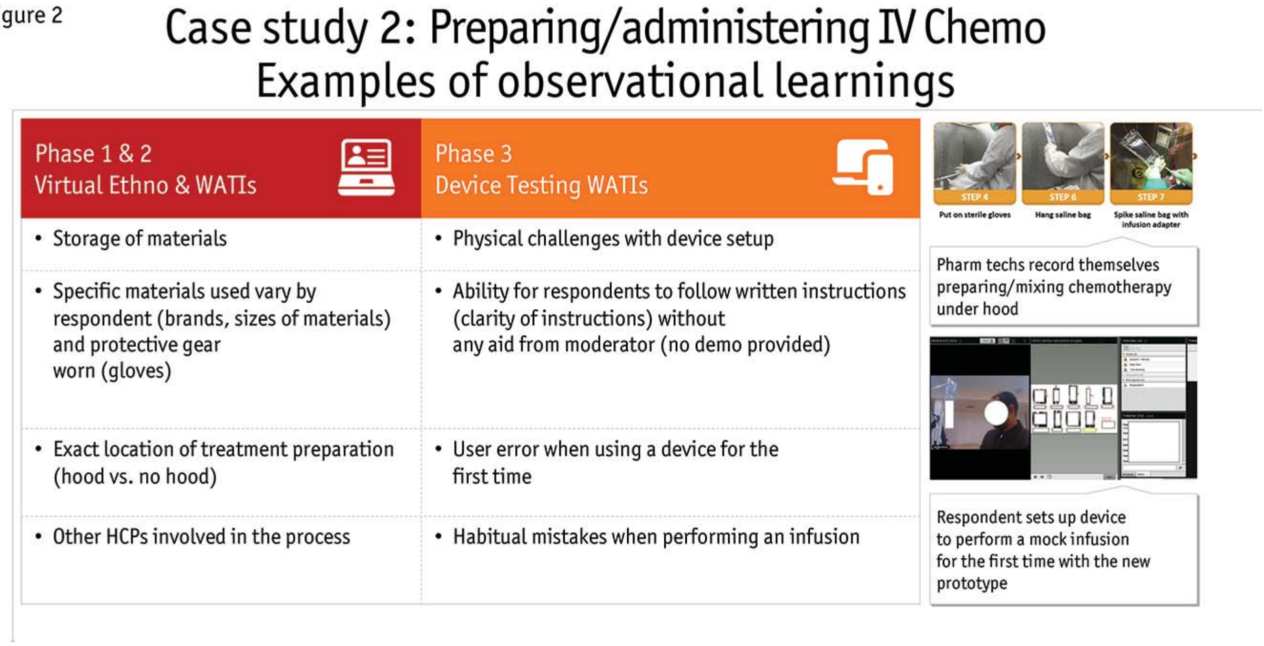
Case studies

The two case studies provide context for the use of these three approaches, as well as shows some of the challenges faced in conducting virtual observation.

Case study 1: home health infusion unmet needs

In the first case study (Figure 1), the goal was to understand the workflow for patients and home health nurses with large-volume infusions and identify the unmet needs that exist for both types of end users. The study was originally planned as four-hour in-home observations, including both shadowing nurses as they treat pa-

Figure 2



Case study 2: Preparing/administering IV Chemo
Examples of observational learnings

Phase 1 & 2 Virtual Ethno & WATIs	Phase 3 Device Testing WATIs
• Storage of materials	• Physical challenges with device setup
• Specific materials used vary by respondent (brands, sizes of materials) and protective gear worn (gloves)	• Ability for respondents to follow written instructions (clarity of instructions) without any aid from moderator (no demo provided)
• Exact location of treatment preparation (hood vs. no hood)	• User error when using a device for the first time
• Other HCPs involved in the process	• Habitual mistakes when performing an infusion

Pharm techs record themselves preparing/mixing chemotherapy under hood

Respondent sets up device to perform a mock infusion for the first time with the new prototype

tients and observing patients as they self-administer. COVID-19 required pivoting to a virtual approach in observing infusions without entering people's homes. A virtual two-phase approach was used.

The first phase used WATIs with patients and nurses. The WATIs yielded good information on the detailed steps users took in their procedure. They provided foundational learnings, helped identify the overall workflow and identified some of the user needs. These findings would have seemed adequate had a second phase of observational research not been conducted. In the second phase, GoPro cameras were shipped to patients and nurses to video-record infusions. The analysis of the videos showed how there are some unspoken user needs and workarounds that were not mentioned during the WATIs. People were unaware of all the steps that they take in a procedure. After performing the procedure repeatedly over time, it had become automatic and procedural memory took over. Similarly, workarounds that were adopted to overcome the limitations of the device or their environment were not easily recalled because they had become automatic.

Comparing the information obtained across the two research phases is revealing. There is a lot of information gathered in the second phase of virtual observations that was not mentioned during the interviews. For example, in the interviews, patients noted the benefits of the portability of their infusion devices allowing them to move around, even go out to dinner while infusing; however, the virtual observation showed that patients were generally uncomfortable while connected and simply sat on the couch during their infusion, as opposed to doing other tasks mentioned during the interview. During the interviews, there was no mention of issues around personal protective equipment (PPE) but in observations there was some difficulty managing some of the devices while wearing gloves. Interviews did not reveal difficulty with tourniquets but challenges were noted on videos with single-handed tying of tourniquets. There was no mention of port-related difficulties during the interviews but in the videos patients with chest ports did have some difficulties with their self-administration, such as straining their necks. Nurses did not report any priming issues during the interviews but in the videos it was obvious that nurses were looking for a place to prime tubes, such as in discarded packaging or in a plastic bag. Finally, during virtual observations, many weaker patients had significant difficulties opening the packaging materials and disconnecting components, resorting to using their teeth or asking for help.

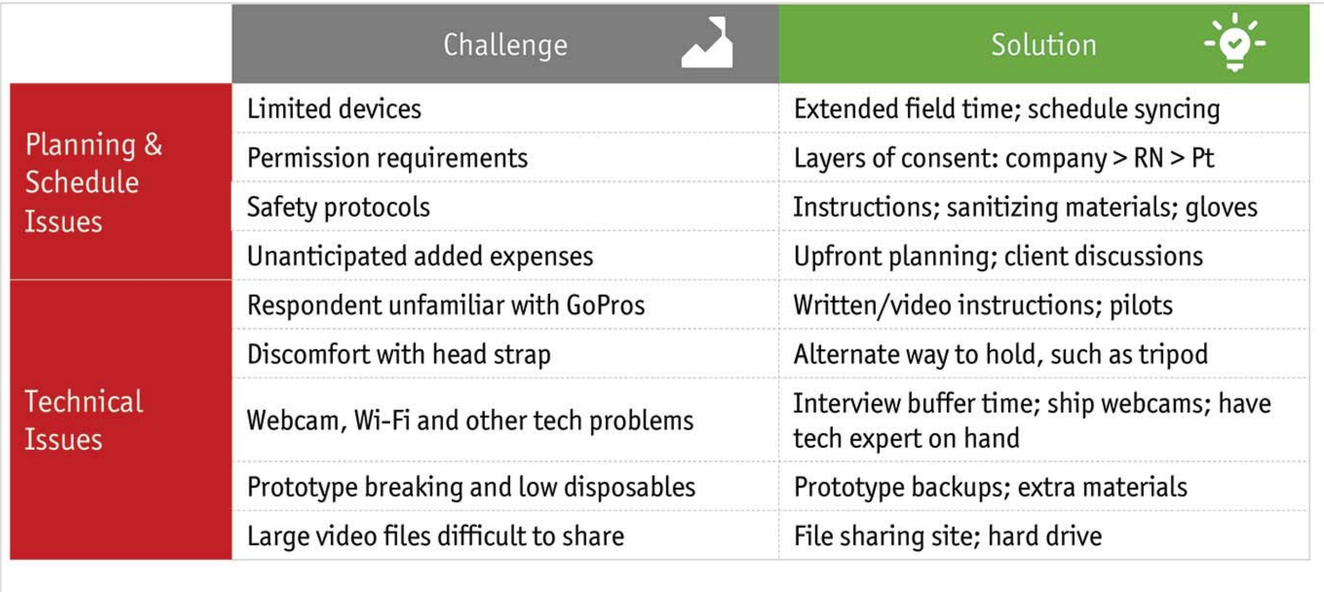
Case study 2: preparing/administering IV chemo unmet needs

The goal of the second case study (Figure 2) was to understand the unmet needs for preparing and administering an IV chemotherapy, as well as test a prototype to fulfill an unmet need. Originally, most of the research was to be conducted in person but COVID-19 caused a shift to virtual research. The three research phases are detailed below.

In the first phase, pharmacists and pharmacy technicians recorded themselves ("virtual ethnography") in their preparing the IV chemo with different setups. The observation allowed researchers to see where in the pharmacy specific materials were stored and if there were any organizational habits in storing. Specific brands of the materials used, different sizes and protective gear worn could be seen in videos. The location of the preparation was shown. Some were in rooms that had hoods to prepare the medication underneath, while others did not have hoods and used extra PPE to handle the materials. Researchers could observe if other HCPs were involved in the process, such as pharmacists signing off for pharmacy technicians.

In the second phase, WATIs were conducted with pharmacists, pharmacy technicians and nurses. Some of the information that would have been gathered during observation was

Figure 3



	Challenge	Solution
Planning & Schedule Issues	Limited devices	Extended field time; schedule syncing
	Permission requirements	Layers of consent: company > RN > Pt
	Safety protocols	Instructions; sanitizing materials; gloves
	Unanticipated added expenses	Upfront planning; client discussions
Technical Issues	Respondent unfamiliar with GoPros	Written/video instructions; pilots
	Discomfort with head strap	Alternate way to hold, such as tripod
	Webcam, Wi-Fi and other tech problems	Interview buffer time; ship webcams; have tech expert on hand
	Prototype breaking and low disposables	Prototype backups; extra materials
	Large video files difficult to share	File sharing site; hard drive

obtained through interviews, such as detailed steps the respondent takes while preparing/administering the treatment. Respondents also discussed unmet needs and reacted to different profiles of potential device prototypes to help with the preparation/administration of the IV chemotherapy.

In the third phase, WATI device testing was conducted using prototypes with pharmacists, pharmacy technicians and nurses. A courier service was used to ship the device prototype to respondents. Respondents simulated use of the prototype during the infusion and preparation process. Some HCPs had questions during the procedure, such as how to attach a part of the device, so live moderating was needed for this phase. Instructions were provided on how to use the device and the moderator purposely did not provide a demonstration. It became apparent what aspects of the directions for use needed improvement. The observation of the device use revealed user errors for these naïve users. Some respondents made unconscious mistakes due to their ingrained approach over many infusions in their career.

Challenges and solutions

Specific challenges were identified during the two case studies and some solutions can be suggested (Figure 3). With the first case study, the researchers had a limited number of GoPro cameras and the process takes substantial time. In both studies, field was extended to include shipping, as well as pilots to determine if the approach and directions were successful. It is important to coordinate schedules of moderators, respondents and shipping. Another challenge is that there are multiple levels of consent: home health companies; nurses; and patients. Safety protocols were another challenge during COVID. The research team developed a protocol, including instructions for the respondents and the courier service about sanitizing materials and use of gloves. There were some unanticipated added expenses. Given the research was planned for in-person, planned travel expenses were used to cover some of the new expenses. It is suggested to include a budget contingency (~5-10%) that gets triggered when unexpected costs are incurred.

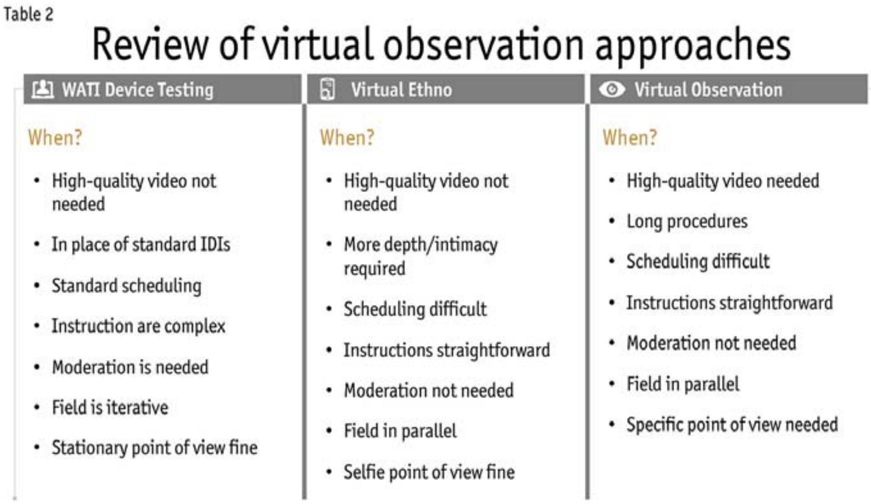
There were some technical issues that warrant mention. Some of the respondents may be unfamiliar with the recording device used, in this case, the GoPro camera. Initially, written instructions were provided but the pilots showed the need for video instructions to show how to use the camera. Pilot interviews also revealed issues with the camera angle used. Instructions were updated to ensure the appropriate camera angle. Some nurses were uncomfortable wearing the camera on their heads, so including a tripod is another way to facilitate videotaping. Other technical issues faced were with webcams and Wi-Fi. It is important to have buffer time built into interviews (+15-20 mins.) to account for technical issues being resolved. Some respondents had issues with the webcams on their computer. It is suggested that all respondents are shipped webcams. Having a technician on hand to help with issues is also advisable. Given prototypes can break and additional PPE may be needed, it is best to have extra prototypes, PPE and disposables available. Finally, video files tend to be large and difficult to share. Sometimes file-sharing sites can be used, while in other cases an external hard drive with password protection is needed.

Conclusions

When should you use these three approaches (Table 2) and how can the challenges faced be overcome? WATI device testing is most similar to traditional in-person interviews and is already the replacement for face-to-face interviews. It is the best approach when a live moderator is needed, such as when directions are complex or if follow-up questions are likely. It fits well with standard scheduling of research. It should not be used if high-quality video is needed or when a stationary point of view from a webcam is not acceptable.

The virtual ethnographic approach is perfect when you want more depth

Table 2



Review of virtual observation approaches

WATI Device Testing	Virtual Ethno	Virtual Observation
When?	When?	When?
• High-quality video not needed • In place of standard IDIs • Standard scheduling • Instruction are complex • Moderation is needed • Field is iterative • Stationary point of view fine	• High-quality video not needed • More depth/intimacy required • Scheduling difficult • Instructions straightforward • Moderation not needed • Field in parallel • Selfie point of view fine	• High-quality video needed • Long procedures • Scheduling difficult • Instructions straightforward • Moderation not needed • Field in parallel • Specific point of view needed

or intimacy. It allows for long and/or multiple observations. It provides the ability to conduct field in parallel. If scheduling is difficult, this is also a great approach. Instructions should be straightforward because there is no live moderation. If a selfie point of view is not desired, this approach is less viable.

The virtual observation approach should be used if you want high-quality video. You can conduct field in parallel. This is great for long procedures and works well when scheduling is difficult. Instructions need to be straightforward given there is no live moderation. You can have different points of view from the video, which can be important for certain projects.

The case studies provide a reminder that observational research is needed. Respondents are not able to recall their actual step-by-step procedures. Habits and workarounds just become part of procedural memory and are not always consciously available. Additionally, the case studies show that the iteration of phases provide a much better outcome than one phase can. The initial phase allows the research team to develop frameworks that lead to specific things to observe or probe on at a later phase. The case studies show that in-person observation can be successfully moved to a virtual approach during this global pandemic; however, even when in-person work is feasible, these virtual approaches can prove useful.

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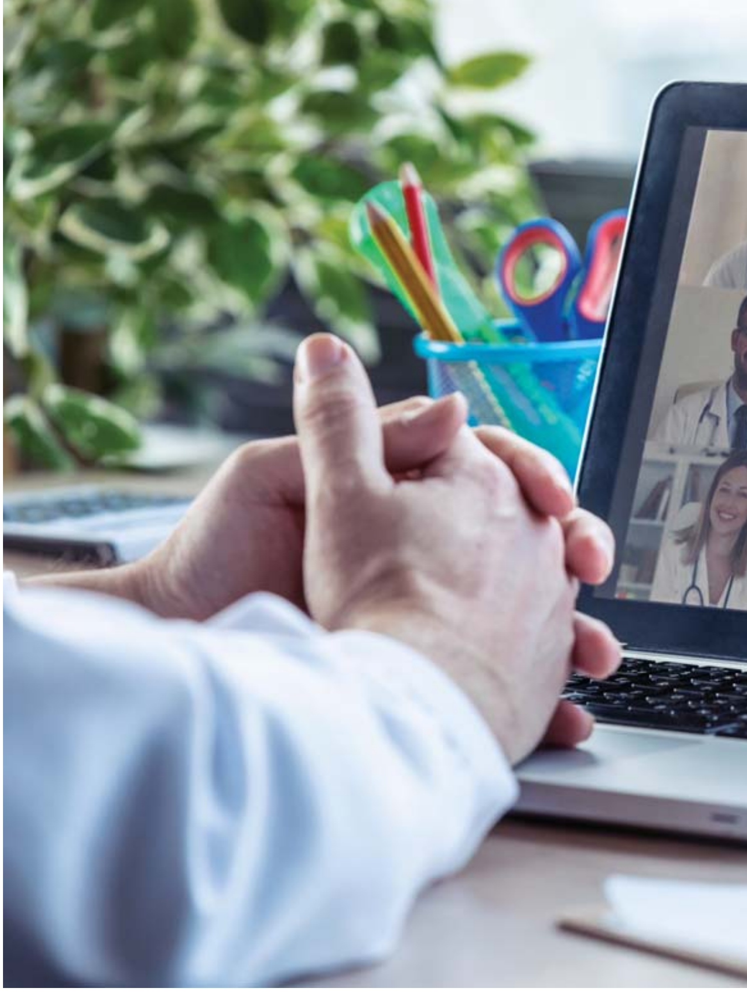
What was lost, what was found

Implications of the switch from in-person to mobile qual

| By Bj Kirschner



snapshot

BJ Kirschner looks at three health care studies and how they were impacted by COVID-driven shifts.

Tap below all that apply:

- In the past week, I have made a purchase using my credit card on a mobile device.
- In the past month, I provided medical details to a physician, physician's office or other health care practitioner on a mobile device.
- In the past day, I have posted pictures or videos of myself on social media.
- In the past second, I realized I was being asked to tap on a magazine article.

Whether you wondered at the initial instruction or at the fourth choice if the writer of this article was batty, I am guessing you were fully prepared to tap. We all do it all day long on our mobile devices. Even I do, and I am, at best, an un-early adopter of technology.

Fossil that I am, my original reaction to mobile applications was negative, though not because I am a technophobe who blames every change in eyesight on small devices but because they were laughably rudimentary. The applications looked ugly, did not take into account different types of devices, often required downloading of other apps just to run the one needed and, of course, your fingers ached just looking at the amount of tapping required. I kept expecting DOS windows to pop up. Oh, and then companies wanted their own bespoke platforms, meaning that respondents would confront unforeseen and different challenges for which recruiters could not prepare them because they were new to everyone. We smoothed that all out and now health care market research is filled with technologically sound and unique mobile applications used across the world, even in countries where technology is less welcome. There is no bigger fan of them for market research use than I.

As we know, 2020 and 2021 have changed the way we use technology and market research has not been exempt. Those of us on the health care

side were fortunate that COVID-19 did not stop our work but rather forced it to change dramatically and quickly. The lifeline of course turned out to be mobile applications, either alone or partnered with web-assisted telephone interviews. A natural fit, it made for a fairly smooth pivot. But two issues that have always existed regarding mobile apps suddenly took on giant importance: over-worrying and overworking. Those terms may sound scary but they are actually positives.

Except when we forget how they all started.

In this article, I will combine what was learned from three rare-patient recruits in 2020 and 2021. Two studies – one with patients who had recent procedures for rare heart conditions and one with late-stage cancer patients – started as traditional in-home interviews but had to change to mobile ethnographies. The third, focusing on patients with a very rare genetic condition, was always a mobile ethnography but the realities of COVID-19 forced changes upon it.

Affects everyone in the process

Let's start with over-worrying, as it affects everyone in the process from the companies sponsoring the research to the companies managing it and of course the respondents. I am using the term "over-worrying" as a fear of the process before it actually begins. Market research has always done that. We spend longer writing and approving screeners than we do conducting fieldwork.

COVID-19 came and we in qual moved everything to mobile apps and video chats. The over-worrying on the client side started with the wondering of how much time would be needed by the respondents to adapt to the new methodologies. In the cardiology and oncology studies, the original study design had a moderator spending a half day with the respondents at home. Experienced moderators seamlessly sweep up answers in free-flow conversations where the information sought comes up as organically as possible. If we switch to a series of online questions and requests for photos and videos, will we lose the natural ease in favor of checklists that will be going on for a few weeks? Will respondents hit a wall of burnout if we ask too much work of them in a short period of time? And, of course, will the patients even feel motivated, given what is going on around them?

The patients, and their caregivers, worried too. Could they figure out the technology? How personal would the questions be? Would the video requests require them to openly discuss intimate subjects and require them to be seen on days they may not be at their best? One cancer patient declined to appear on camera simply upon being told there would be video clips required yet she had been okay with people recording her for five full hours. Perception is everything and she was okay with someone else using a camera as opposed to her doing it.

Remember, the original methodology required a stranger or two hanging out with patients for a few hours in their homes. While the clients were worrying about how to move from the idyll of comfortable chat for a few hours with a video camera that goes unnoticed after a while, the respondents were worried about an increased depth of required information.

Confronted with a brand new situation, everyone was so focused on getting or giving the same information that they broke up the original study design into puzzle pieces and then tried to refit them for the same outcome. Some pieces had to be shaved to fit but ultimately the pieces went back together, mostly. All of this is natural, healthy over-worrying.

But one step was skipped, one we in the qualitative world see as our strength: communication. Perhaps the mobile apps could be used first to "speak" to the respondents and ask them some basic questions about how they felt moving forward with the process. This was instead accomplished with two phone calls (one to set a time, another to speak) but doing it through the mobile app itself would have been not only very fast but also a small technology test for everyone. We over-worried ourselves into complexities when simplicity was staring us in the face.

While the mobile app exercises were being programmed, the overall study designs were decided. Two studies follow the same pattern: a recruiter booking interview times, an introductory phone call from the client, a few e-mails with instructions, exercises released at the same time each week for four weeks with video chats after the exercises. Five phone calls, four weeks of exercises, three (dozen) e-mails – and a partridge in a pear tree.

Did the new design actually address the worries? The clients, wanting the respondents to feel comfortable and not burdened, relied on the benefit of time to take care of their worries – the less required at a time, the less chance of fatigue. The respondents' issues of what would be asked and how comfortable they would be had to wait until it all started, to find out if their fears were sound, but the chance to talk to a person over the phone was a worthy attempt at keeping it more personal. The clients had the respondents' best interests at heart; they were understanding and solicitous. But, could they have gone one step further and asked this in a few short mobile app questions, once again a technology check, but this time more personal because it openly asked for specific opinions in shaping the process individually?

No one was wrong

I should say that that no one was wrong in how they made decisions. The world was in chaos, we were over-worrying 24/7 about life-and-death issues, no one had the answers. My only point is that over-worrying by groups of people who seek solutions by trade was so intense that we may have made things harder for ourselves, the step when worrying becomes over-worrying.

When the new design was presented to the respondents, their first thoughts were ones of intimidation – in other words, overworking. Yes, they were being paid hearty incentives, their schedules were being respected and no force was ever exerted but they saw the process as long and technical, personal in the fact that they were sending videos of themselves but at the same time impersonal because it was all happening over little devices.

For 75% of the respondents, everything went pretty much as planned. The respondents sailed through the exercises, tossing aside fears. Some found themselves so deeply invested, so proud of their work, that success created more diligence and more success.

Most of the exercises required maybe 10 minutes a day. But the respondents, aiming to please, often spent triple that much time. A video request to answer a "how are you feeling today" netted videos of 20, 30, even 60 minutes – the step when working becomes overworking. The clients were thrilled with the information. They did not want to risk anyone losing steam, so at times they asked that the recruiters perhaps gently remind the respondents that no one was trying to take up so much valuable time – but not in a way that made it seem like a bad thing. The respondents didn't even realize how long they were spending.

Did we lose a chance right there? Why have the recruiters broach the topic of too much time? Why not program a question on the mobile app that is a self-assessment? You get an honest answer and it takes one less phone call. Like the other missed opportunities, a small one, but missed nonetheless.

Not everything went so well. In the end, mobile apps are still technology-based, which means total control is not in the hands of humans. I have not mentioned until now that not all of this work was in the United States. It's a logical assumption, as where else do respondents go on at such length? One of the studies was in the U.S., Europe and South America. South America proved challenging because some of the respondents were in very remote locations where internet conditions were not strong enough to handle video uploads of 10 minutes (or lots more). We went through a raft of solutions. One was: Let's send cameras! No. Turns out postal employees were not showing up to work for fear of getting COVID and mail was at a crawl. How about friends and family, anyone with better internet speeds? No. That would be breaking quarantine. It was tough finding solutions but eventually we worked it out with each respondent individually. As soon as we did, we realized we skipped the obvious step: use the mobile app to ask the respondents their suggestions.

Filled with valuable insights

Did over-worrying lead to overworking? Yes, absolutely. Did over-worrying make things more complicated? Yes, but in the context of a global pandemic, not with harm. Did the respondents overwork? Yes, but every second of it was filled with valuable insights and nary a complaint. Was client over-worrying valid? Absolutely. Was respondent overworking burdensome? For a few respondents, yes, but overall, no.

Did mobile apps live up to their full potential during the worst of the pandemic? No, but only because we were all so focused on over-worrying and overworking that we missed the small details: we missed making use of the mobile apps for tiny scraps of feedback. Did that hurt or hinder market research, the use of mobile apps, the willingness of respondents? Of course not. But, as we face a world where not everyone is going back to the old way of doing things, is it time to look at this methodology again and see how it can benefit us in ways we overlooked amidst that hazy mix of great intentions and general uncertainty?

Tap below all that apply:

➲ I will always over-worry; all market researchers do.

➲ I will always allow respondents to overwork if they are not complaining.

➲ I will try to look for simplicity among complexities.

➲ I will once again fall into the trap of you trying to make me press a button in a magazine article.

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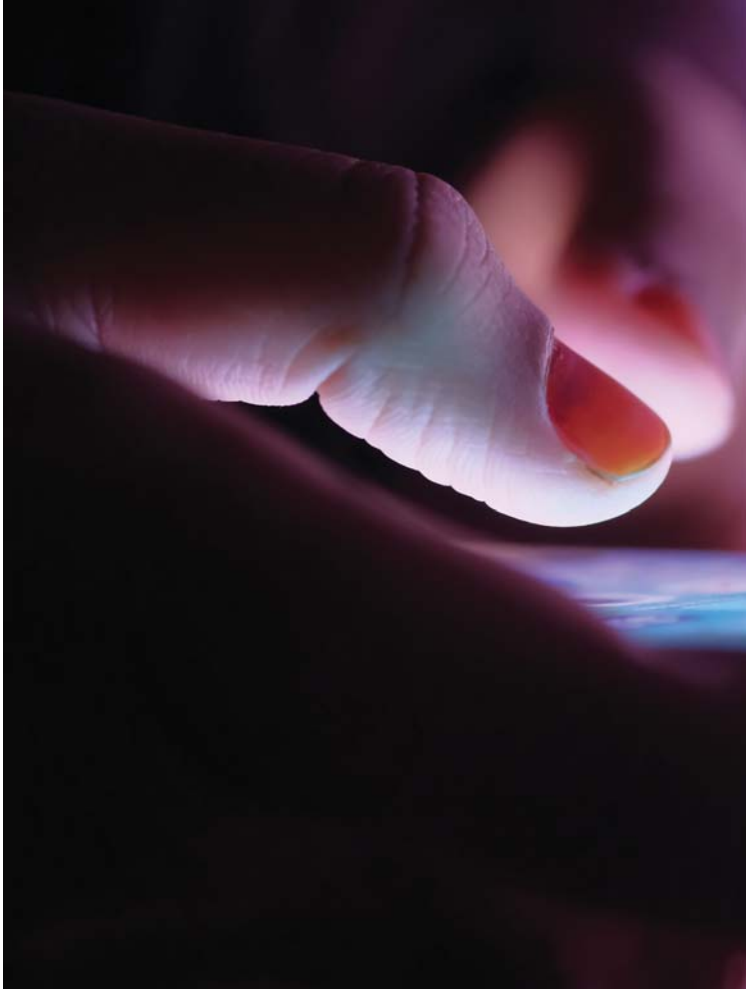


Optimizing for effectiveness

Building ad campaigns for smartphone success

| By Jon Brand

snapshot

Jon Brand offers four guidelines to help you test and develop advertising that stands out on small screens.

Even before the COVID-19 pandemic, mobile media were playing an increasingly powerful role in consumers' lives – and, not surprisingly, in media budgets. In the U.S., mobile media now exceeds one-third of all media spending and a 2021 GfK study shows that, among common digital technologies, smartphones are most trusted and relied on by U.S. consumers.

Throughout the day, consumers return to those small(er) smartphone screens again and again – for an average of 63 interactions every day, according to Leftronic. No other technology or platform can claim this kind of repeated exposure and 24/7 influence.

But when it comes to advertising, smartphones – and mobile devices generally – are too often playing second fiddle to "traditional" technologies: TVs and PCs. There has been little effort to truly understand mobile ads in their own context and environment. Evaluative approaches are not as robust as traditional TV techniques – and systems are often inconsistent with past testing, leaving management confused on how to interpret.

The truth is that little is actually spent on digital ad testing in general; simplistic approaches with few diagnostics provide a minimum of information or inspiration to drive stronger creative. And when it comes to mobile ads, the commitment to evaluating and refining is even weaker. Despite the impressive growth in streaming over mobile devices, they simply are not given their due.

Create special demands

We know that consumers interact with mobile devices in unique and specific ways – vastly different from a TV or PC environment. Screen size has a huge effect on how people engage with and experience advertising; small pictures and uncertain sound quality create special demands on creative. Frequently, mobile media are viewed in the context of other activities – watching TV, working or even socializing. And people bring a different mind-set to smartphone time than they do to larger screens; it is less about

kicking back and more about getting things done.

Making the right impression in a mobile context requires a special, dedicated focus on what works in this sometimes unforgiving environment. A standout campaign created for bigger screens may translate poorly to handheld devices. There are good reasons to say, in fact, that smartphones should be the primary platform advertisers use for evaluating their campaigns, as they provide a more challenging creative context for ads.

Brand managers, ad creators and media planners all need to put their mobile thinking hats on – not to think “smaller” in terms of ambition but rather to make the most of every platform on its own terms.

Problem only grows

We know that consumers are increasingly difficult to engage in any context. Two-thirds of people say they feel “bombarded” by advertising and just three out of every 100 ads make an impression on consumers. This problem only grows when it comes to mobile platforms, because people are less receptive to ads on smartphones and tablets, as compared to TVs. GfK has found that just 11% have a favorable view of mobile ads, compared to 49% for TV ads.

With all of these challenges, how can brands capture and keep the attention of smartphone and tablet users? The good news is that GfK’s Ad Fit Optimizer has shown that well-executed ads on smartphones can be as effective as on larger screens – though the standards for success must be a little more stringent. Like all ads, simple and visually stimulating ads are most effective at engaging consumers on small screens. Emotionally engaging consumers with content that is personally relevant is critical, whether the ad is a video or display, long or short.

Recent GfK research – focusing directly on how people react to ads in mobile environments – looks at two key aspects of effectiveness: hook (the ability to grab attention) and hold (the challenge of keeping consumers engaged). Ads that score high in both of these areas, when viewed in a mobile environment, stand the greatest chance of impacting people.

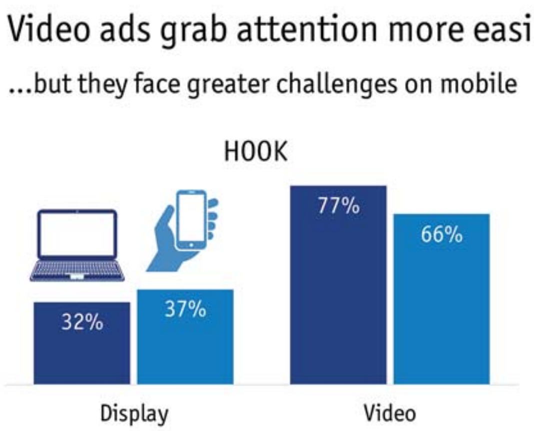
Homing in on ad exposure and use in mobile settings, our study has revealed a number of guidelines for successful campaigns – what will cut through the mobile clutter and speak to overwhelmed consumers.

1. Be bright and clear

On mobile devices, consumers are active scrollers, moving down a page quickly and skipping over content that does not capture their interest. Our study shows that consumers often scroll right past ads (video 25% and banner 42%), never paying any attention to them.

And even those ads that consumers do happen to look at are often quickly dismissed on

Figure 1



Video ads grab attention more easily than display...

...but they face greater challenges on mobile

Source: GfK Ad Fit Optimizer database
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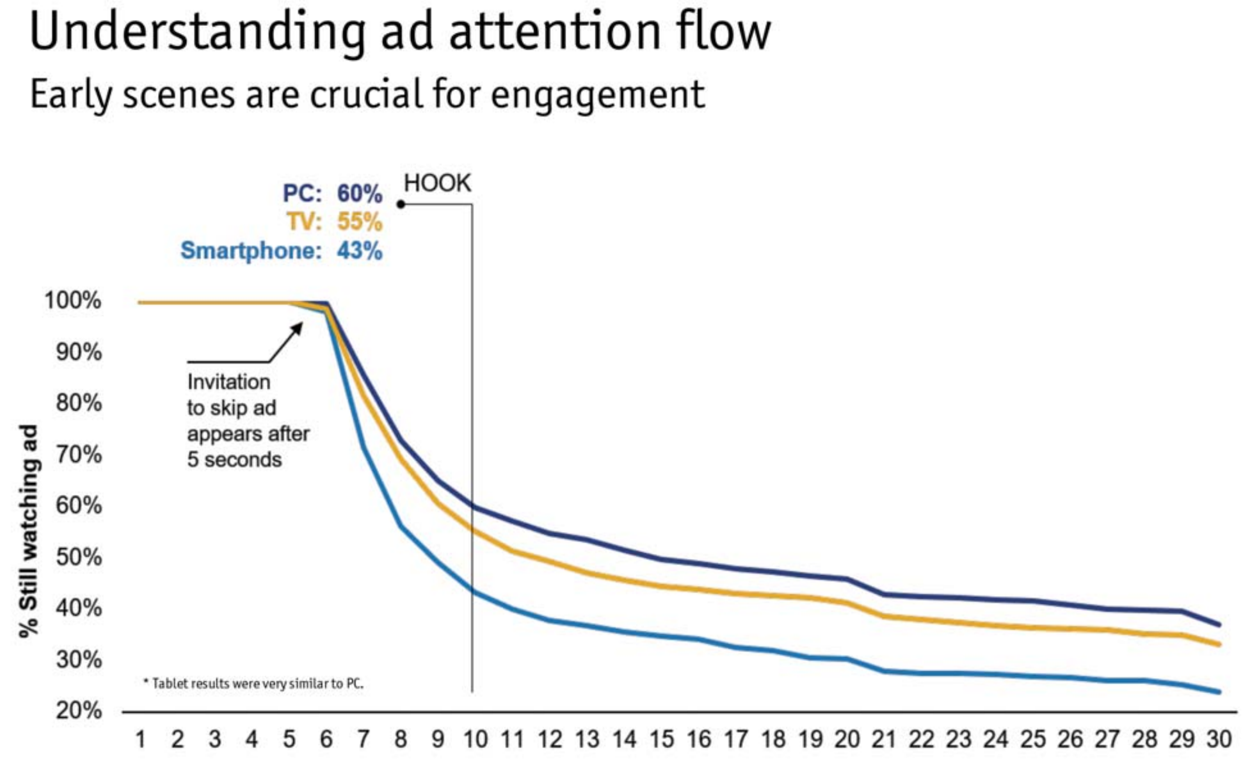
Figure 2



Understanding ad attention flow

Early scenes are crucial for engagement

Source: GfK Ad Fit Optimizer database

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smartphones, with only two-thirds still watching an ad after 10 seconds. In comparison, 77% of consumers are still engaged at that point on TVs and PCs.

Moreover, social media ads are increasingly being viewed on mobile devices, which creates additional hurdles in engaging consumers. In addition to screen size, ad length and scrolling, ads must also overcome the fact that all sound is typically muted on social media unless specifically activated by the viewer. This makes video ad visuals particularly critical for social platforms.

Display ads also play a key role in mobile media budgets. While they are not impacted by screen size as much as video ads, display creatives face their own fundamental challenges in connecting with consumers on small screens (hook is less than 40%), making it critical to focus efforts on how to attract consumer attention (Figure 1).

We also have found that bright and vibrant colors and engaging close-in visuals (rather than long-distance shots) help draw viewers into ads on smartphones. Moreover, initial scenes in video ads that intrigue consumers and/or pull them in emotionally are most effective (Figure 2). In contrast, ads that are more mysterious – not revealing their key messages till the end – and have darker visuals and fast-changing scenes often are less able to engage consumers.

Takeaway: Attention to ads on smartphones is even more fleeting than on larger screens but trading moody and mysterious for upbeat and inviting can do a lot to make up the difference.

2. Simplicity leads to staying power

Sustaining engagement with ads is usually much tougher than simply grabbing eyeballs. This is even more true for ads on smaller screens; while only (51%) of consumers watch the full video ad on a smartphone, the figure is nearly two-thirds (61%) for the larger screens. When it comes to banners, consumers spend very little time with them – roughly two seconds.

Younger individuals who grew up with smartphones have developed the most unique relationships with their phones and the content they view on them. They are the most likely to disengage from ads on their smartphones very quickly relative to how they respond to ads in other environments – so ads targeting young consumers need to be particularly sensitive to how to engage them.

In their own way, though, older consumers are also proving to be very hard to hang onto. While mobile ads rate below those on traditional screens for maintaining engagement across the board, the shortfall is particularly severe in the 60-plus age group. Like young consumers, Boomers are half as likely to stay with a mobile ad when compared to ads on a large-screen. This often relates to the ability to focus on the detail on the small screen.

Mobile ads on social media pose a particular engagement challenge for advertisers, with viewers spending just 2.3 seconds on average with ads served through a social platform (Figure 3). In comparison, non-social mobile video ads hold attention for 19 seconds and laptop ads for 22 seconds – dramatically longer.

The hurdles facing video ad engagement have driven many marketers to move to shorter video ads, including six-second executions. These short-form video ads provide their own unique challenges to creative teams. It is es-

Figure 3

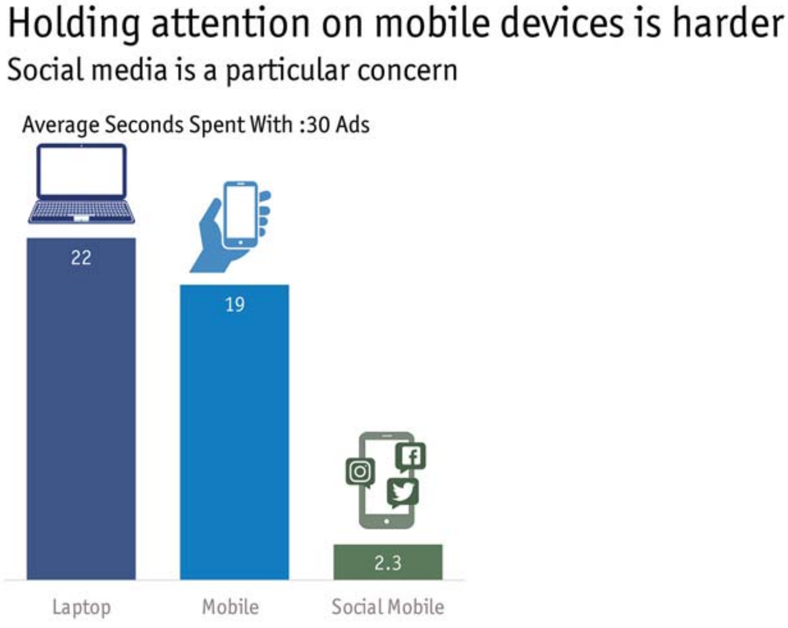

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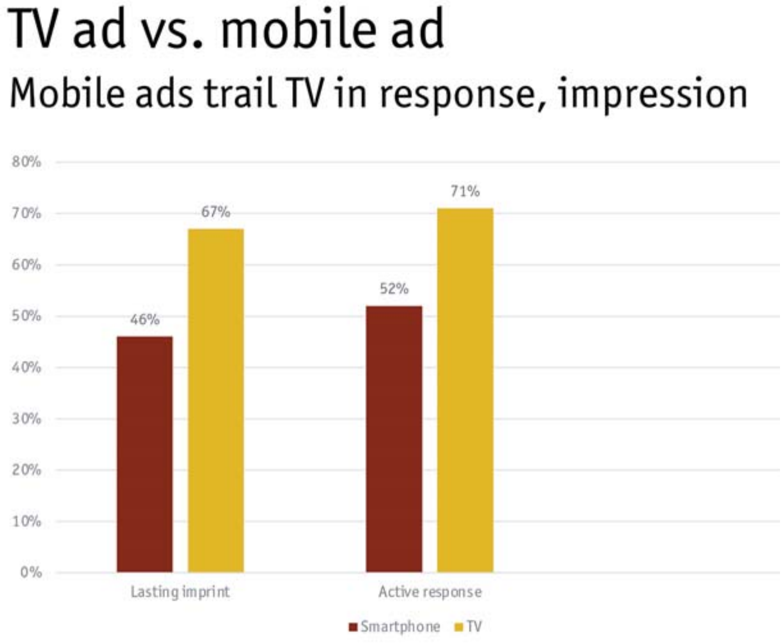
Figure 4



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sential that ads make an emotional connection with consumers and we find that this happens most efficiently when messages are simple and relatable. Our research shows that people are slightly more likely to feel affection in response to smartphone ads – so the opportunity for intimacy and engagement is real.

Takeaway: To maximize "hold" with small-screen advertising, focus on younger cohorts and stay away from complicated content and messages.

3. Larger is often better

The smaller screen size makes things that appear clear and inviting on larger screens seem distant and hard to read. Logos and other branding elements are a particular concern, hindering linkage back to the brand. Similarly, visuals that are long views can become less engaging to the viewer who feels less a part of the action. Doing visual checks of how ads look on small screens can help overcome these issues.

Takeaway: On smaller screens, there is an even greater need to "think big" – especially when it comes to branding elements.

4. Play the long game

With attention spans being shorter on mobile devices, it is not surprising that mobile ads are less likely to leave a lasting positive impression and trigger a response than those seen on TV (Figure 4). Keeping ads engaging and messages simple will help mobile advertising have more of a lasting impact.

Takeaway: Focusing on an ad's ability to engage and communicate will help overcome the challenges of working in a mobile environment.

5. Test in realistic settings

It may seem obvious, but to understand what works on mobile devices, it is essential to test ad creative on those technologies, in situations that replicate actual exposure. The dramatic performance differences between traditional screens and smaller, mobile ones show that setting is (almost) everything. Does your testing replicate the multitasking, highly fragmented world that smartphones inhabit? Can you get a clear sense of how your creative and messaging will come through in a mobile environment? There may be a great deal of money and effort riding on these questions, so getting the right answers is a must.

Takeaway: To be sure mobile is served by your campaign, take a mobile-centric approach to your research as well.

Respect and concern

As smartphones continue to claim a growing piece of the ad pie, brands and agencies need to treat this always/everywhere platform with high respect and concern. The effectiveness of campaigns will increasingly hinge on mobile performance and making sure that creative anticipates this environment is essential.

How strong is your mobile ad game?

Jon Brand is senior vice president in marketing effectiveness at research company GfK. He can be reached at jon.brand@gfk.com.

••• health care research

Clearing the air

The role of marketing research in studying consumer response to modified-risk tobacco and nicotine products

| By Michael Feehan

snapshot

The author offers a beginner's guide to the FDA regulatory research landscape.

Combustible cigarettes pose an enormous population health burden through the dangers of exposure to tobacco smoke. Tobacco manufacturers are actively repositioning themselves and their product lines to bring potentially reduced-harm tobacco or nicotine continuing products (TNP) to market as alternatives to combustible cigarettes. To legally market such new TNP, manufacturers need to receive U.S. Food and Drug Administration (FDA) "marketing orders," supported by extensive research that includes primary research with consumers, that can help inform the population health risk and benefits of a new product. Outlined here is the rationale for this change in positioning, a snapshot of FDA oversight of the industry and a quick guide to the major primary research approaches used to gauge consumers' perceptions and likely use of potentially reduced harm TNP.

No risk-free level of exposure

Cigarette smoking is responsible for many diseases as well as the reduction of overall health. According to the U.S. Department of Health and Human Services, Centers for Disease Control and Prevention Centers (CDC),[1] smoking is the leading cause of preventable death and one of every five deaths (438,000 deaths) in the United States annually is attributable to cigarette smoking. As noted by the U.S. surgeon general, science suggests that there is no risk-free level of exposure to tobacco smoke.[2]

Recognizing the risk posed by combustible cigarettes the American Cancer Society (ACS) position statement states:

"In recognition of the disproportionately large role that combustible tobacco use plays in causing morbidity and mortality in the United States, ACS will expand its existing tobacco-control efforts and execute new comprehensive strategies to eliminate all combustible tobacco use, with the goal of substantially reducing cancer incidence and mortality and other adverse health effects."[3]

Manufacturers are thus focused on bringing to market TNP that present a reduced risk of harm to the adult populations' health versus combustible

cigarettes. Altria Group Inc.'s vision "… is to responsibly lead the transition of adult smokers to a non-combustible future."[4] Philip Morris International Inc. is "… designing a smoke-free future,"[5] and Reynolds American Inc. wishes to encourage "… smokers who do not quit entirely to consider switching to these tobacco products."[6] These non-combustible TNPs comprise a range of product types and mechanisms for nicotine delivery including electronic nicotine delivery systems (ENDS), commonly referred to as e-cigarettes or vaping; heated tobacco products ("heat-not-burn" tobacco-leaf-containing products); snus (tobacco-leaf-containing pouches); and derived-nicotine pouches without tobacco-leaf.

This movement to encourage adult cigarette users to convert to potentially reduced-harm TNP use can arouse cynicism from anti-tobacco advocates. Particularly with concerns around the potential marketing of such products to youth (expressly forbidden by the FDA) and as yet, the lack of long-term health outcome data for these products. Nonetheless, the acceleration of reduced harm TNP applications to FDA and an increased likelihood of those applications being successful is dramatic. This is a tide that will not be turned as manufacturers and research organizations gain more familiarity with FDA requirements for consumer research. Also contributing to this change is increased public accountability, as companies are now being tracked on their commitment and progress towards non-combustible TNP.[7]

Address potential health risks

The FDA regulates all TNP under the Family Smoking Prevention and Tobacco Control Act (FSPTCA)[8] through the FDA Center for Tobacco Products (CTP) a final deeming rule (81 FR 28973),[9] extending authority to all products meeting the statutory definition for tobacco products. The process to bring a new TNP to market with an FDA-issued marketing order, is through a premarket tobacco product application (PMTA).[10,11] Applications are required to address the new product's potential health risks and CTP recommends that data is collected to gauge the potential impact of the new TNP's marketing on tobacco use behaviors of current users of combustible cigarettes, ex-users and non-users. Another application process is used when the manufacturer wishes to demonstrate to FDA that the new TNP is likely to provide lower population health risk than combustible cigarettes and they will want to market the product with claims communicating that reduced risk. The modified risk tobacco product (MRTP)[12] application must "demonstrate that the product will, or is expected to, benefit the health of the population as a whole."

It is important to appreciate that MRTPs can reduce the harm to the population, even if they themselves carry risk. The Institute of Medicine (IOM)[13] notes:

"A product is harm-reducing if it lowers total tobacco-related morbidity and mortality, even though use of that product may involve continued exposure to tobacco-related toxicants."

As the IOM asserted (p. ix):[13] "The fundamental issue is that if a product is going to be marketed as being 'safer,' then the claim must be true." Amy claims made by manufacturers through TNP marketing need to be evaluated from a consumer perception perspective to reassure the FDA's CTP that the claim contents are correctly interpreted and do not give rise to perceptions that the TNP is safe.

This, then, is the role of consumer behavior and perception researchers: to conduct real-world evidence and other regulatory-focused consumer studies generalizable to the population that can be viewed as rigorous to exacting FDA standards, that manufacturers can rely on in their PMTA and MRTP filings. The IOM has identified minimum standards for research studies that an applicant would need to complete to obtain an MDA order to market the product.[13] Such guidance, increased familiarity with the PMTA and MRTP study requirements by manufacturers and research suppliers and the growing experience of FDA reviewers with such applications has seen a rise in the number of applications being submitted and a greater proportion being approved. As of August 31, 2020, from 2011 to then, 33 MRTP applications were submitted to FDA but only 12 were successful. However, all those successes were achieved through applications reviewed in 2019 and 2020.[14]

Be of most relevance

MRTP applications must submit to the FDA scientific evidence to demonstrate the product has the potential to reduce health-related harms compared to combustible cigarettes. Many kinds of laboratory, pre-clinical and biomarker studies can address the TNP constituent's potential toxicity and potential for addiction but it is the consumer behavioral and perceptual studies that may be of most relevance here. To approve MRTP marketing orders, the FDA needs to consider the relative health risks to individuals of the TNP; the increased or decreased likelihood that existing users of tobacco products who would otherwise stop using such products will switch to the TNP; and the increased or decreased likelihood that persons who do not use tobacco products will start using the TNP.[12]

The IOM[13] notes that observational epidemiological studies over time can inform applications, reporting out the health outcomes of users as inputs into population health models aiming to demonstrate the potential gain in public health through the adoption of MRTPs. However, other kinds of studies can inform these models that may not necessitate following users over long enough periods to determine actual health outcomes. Among these are three major study types: understanding consumer perceptions of health risk; measurement of conversion behaviors away from combustible cigarette use; and evidence from behaviors and perceptions tracked after product launch.

Comprehension of claims

Consumer risk-perception studies explore consumers' beliefs about the likely disease or addiction risk of the product and their (and others around them) exposure to possibly harmful constituents; how those perceived risks compare to other products available and their intention to use the product if it becomes available. Explicitly required is research that demonstrates that consumers do not erroneously come to believe the product is risk-free. Another class of these studies can explore the comprehension of claims about the potential lower health risk posed by the product (for use in an MRTP application) and any resultant change in beliefs about the health risks of product and associated changes in intent to use it.

One example of this kind of study is the study done by Pillitteri, Schiffman and Sembower, et al. (2020),[15] which was sponsored by the RAI Services Company in support of regulatory submission to the FDA for snus, a smokeless tobacco product. The goal of the research was to see if effectively communicating health risk information for the product could facilitate smokers switching completely to snus (a requirement of FDA in reporting such studies), thereby benefiting public health. The cross-sectional study assessed comprehension and perceptions of modified-risk information regarding snus among almost 4,000 smokers, former tobacco users and never tobacco users from a U.S. internet panel. Participants reviewed an advertisement stating that smokers who switched completely to snus could greatly reduce their risk of lung cancer, respiratory disease, heart disease and oral cancer. The results of the study confirmed that "respondents demonstrated good understanding and application of the modified-risk information and did not develop misperceptions that snus is completely safe."[15]

Use and potential misuse

Actual use studies (AUS) involve a prospective cohort design and provide information on both the use and potential misuse of the novel product. In these studies, respondents are supplied TNP and followed over time to gauge their levels of product use (and potential misuse) and measure any corresponding changes in their use of combustible cigarettes. In an AUS, participants are given the option of using the study product and any other TNP including combustible cigarettes ad libitum (as much or as often as necessary or desired). In an AUS, respondents will typically be cigarette smokers (who may or may not use other TNPs) who will be followed in a baseline period to ascertain their daily TNP use, then provided the study product at no charge and followed-up with at regular intervals, while recording their daily consumption of all TNP.

Research conducted by Kantar's Health Division, sponsored by Philip Morris International Inc. (Roulet, Chrea and Kanitscheider, et al., 2019)[16] contributed to an FDA MRTP application for its tobacco heating system (THS). This AUS study had a six-week observational period in which adult participants made periodic visits to research sites in eight cities, were provided a non-combustible THS at no charge and completed a daily electronic diary of all their TNP use. A telephone hotline was provided for participants to report any adverse health experiences. This AUS showed that after a six-week period of ad libitum use of the THS, almost 15% of the daily adult smokers substituted combustible cigarettes with the novel product. FDA granted the manufacturer a PMTA marketing order in 2019 and a subsequent marketing order as a modified risk tobacco product (MRTP) in 2020. In its MRTP press release, the FDA noted that: "Data submitted by the company shows that marketing these particular products with the authorized information could help addicted adult smokers transition away from combusted cigarettes and reduce their exposure to harmful chemicals, but only if they completely switch."[17]

Postmarketing surveillance studies

A third major class of research around new TNPs are postmarketing surveillance (PMS) studies. In making MRTP marketing orders, FDA also requires that manufacturers annually conduct PMS studies in order to determine the impact of the order on consumer perceptions and their behavior and health. A comprehensive review of the FDA requirements for MRTPs and their origins in pharmacovigilance for medicines is available.[18] However, given the very few MRTP marketing orders issued to date by the FDA and the possibility of a wide variety of research methods that can be explored, this research growth area can still be considered relatively fledgling.

One recent PMS example from Kantar's Health Division (Adamson, Kanitscheider, Prasad, et al., 2020)[19] is a PMS pilot study sponsored by British American Tobacco to evaluate behaviors and perceptions of 4,154 adult respondents in Japan after the launch of heated tobacco products (HTP) in that country in 2014. This study was a cross-sectional epidemiological survey, with paper-based questionnaires administered door-to-door. A total of 779 respondents were current TNP users and among those, 254 respondents self-identified as HTP users. Compared with 12 months before the survey, 12% of sole combustible tobacco product users were now using HTPs exclusively. While allowing for multiple responses in the survey, the majority selected "reduced harm to people around them and themselves compared to conventional cigarettes" as a reason for HTP use and 10% indicated an intent to reduce or quit cigarette consumption.

As the FDA continues to grow the number of issued marketing orders for MRTPs and products such as HTP become more commonly used in the U.S., appropriate PMS methods will need to be developed and refined to demonstrate conversion away from combustible cigarette use and the potential health benefits for the population.

Can be challenging

Doing consumer research with a regulatory focus in the TNP arena can be challenging given the rigor required by the FDA in documenting the study design and its conduct and the specificity required in the reporting of findings. For example, some studies may necessitate that all data be managed in CFR Part 11-compliant electronic data systems[20] and conform with rigorous client-approved statistical analysis and reporting standards.[21]

There is not a roadmap of a long history of successful applications to draw from, so there is ample opportunity to be creative in approaches while maintaining FDA rigor. Any studies will require a detailed protocol approved by an institutional review board and often specify how independent monitoring of the research is to be conducted to ensure adherence of the oversight research team, client and third-party research suppliers to that protocol and ensure the well-being of study participants. Designs are increasingly required to be flexible in recruiting strategies to accommodate changing demographic and TNP usage patterns of the population (e.g., the rise of dual use of combustible cigarettes and other TNP) and also be responsive to ever-changing U.S. federal or state restrictions on the availability of TNP (e.g., "flavor bans" in some U.S. states which may necessitate research waivers). One emerging need accelerated by the COVID-19 pandemic is the trend seen with some clinical trials to move to decentralized approaches, where participants are interviewed remotely using videostreaming capabilities, complete surveys online and receive product through other channels than in-person at a research site.[22,23] The unique requirements around ensuring the product recipient is the correct one of the right age and sound logistical, legal and ethical procedures for TNP distribution and accountability are in place can make remote product distribution a challenge in the TNP space.

Conducting primary consumer research in this area can be demanding, especially with an eye to the acute level of detail needed to ultimately support successful FDA submissions. However, the research is intellectually stimulating, creative and can be personally rewarding. Ultimately there are few arguments against the population health goal of reducing or eliminating combustible cigarette use (and the prevalence of preventable cancer and other disorders) and contributing consumer research to the knowledge base that can shape that smoke-free future.

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Grow your incidence

Diversifying the market research workforce

| By Brooke Reavey and Jamie Shaw

snapshot

Tips for attracting college and university students of color to careers in marketing research.

Imagine the dedication needed to wake up before the sun rises so that you can take three trains and a bus to make it class by 8:00 a.m. Or think of the requisite grit needed to work two jobs, one of which might be full-time, while enrolled in six college-level courses in order to contribute to the family mortgage and pay this semester's tuition, all while maintaining a high GPA so that precious scholarship funds are not eliminated. This is the type of determination, work ethic and perseverance employers say they want in employees and these are the students that we serve. Why, then, are companies still having a hard time recruiting entry-level talent with these characteristics?

We work at Dominican University in River Forest, Ill., a Hispanic-serving institution (HSI) that frequently recruits low-income, first-generation-to-college (first gen) students. Our university is dedicated to increasing social mobility – by breaking the cycle of poverty so that our students can thrive despite life circumstances. One of the easiest ways for us to help increase their social mobility is to assist students in finding high-paying internships and professional careers post-graduation in their major field of interest. As we have both discovered, though, that task is easier said than done.

Firms frequently issue statements regarding their commitment to a diverse workforce and we truly believe companies want to be inclusive but often fall short. If your organization is wholeheartedly interested in a diverse workforce, we have a few ideas for you to consider based on our experience of helping organizations recruit and retain our diverse students. Our employer partners (many national and international companies) engage in these tactics quite well and we want to share with you some of the tips that we've gathered over the years.

Recruit from regional schools before you go national. You might be surprised how many regional schools in your "backyard" are preparing students for the marketing research industry. In our experience, these students are frequently passed over because they don't come from elite universities. Keep in mind that most Black, Indigenous and people of color (BIPOC) and

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first-gen students are more likely to attend a regional school because it's not as intimidating and they feel like they fit in better.

One way to broaden your recruitment is to look for applicants from business schools with accreditations such as the Association to Advance Collegiate Schools of Business (AACSB). AACSB accreditation ensures that the students are being taught current information regarding business and, in particular, marketing. Accredited schools have to jump through figurative hoops to maintain their accreditation. The school's curriculum is audited every five years by a panel that ensures that it is modern and, as a measure of checks and balances, the school has to report the percentage of students who found full-time employment after graduation. Therefore, you can rest easy that these students are learning modern market research techniques.

Ask for market research qualifications and experience early in the recruiting cycle. One way to ensure that you are objectively selecting qualified applicants is to ask internship and entry-level candidates to state their qualifications early – at the application stage. Many market research or marketing strategy instructors have their students work with clients (companies like yourself) on intense projects in class. Students likely have the practical experience that your firm seeks but they have no way of telling you this until the interview stage. Therefore, start the recruitment backwards. Ask them to state their MR experience first and let them know to share classroom or experiential learning experiences so that you can see who has the most qualifications without subjectively picking out applicants purely based on school name.

Volunteer your time at a local university that has a diverse pool of students. Historically black colleges and universities and HSIs are great places to start. You can volunteer to serve as a guest speaker, run a workshop, work at a recruiting event or work with the career development office to participate in mock interviews or résumé reviews. This does not cost a penny, except time, and the more accessible your firm, the more likely your firm will spark the interest of a budding market research student and increase your talent pool.

Help make the market research and analytics industry look and feel more accessible. As marketers, we know that ads must feature your intended target market (e.g., an ad featuring running shoes should include someone running). Despite this, based on years of teaching experience, we note that the vast majority of market research textbooks, accompanying videos and webinars mostly feature white people as the main focus. While the MR industry can't control what textbook material looks like, firms can control their presence and reach in the market as a way to make the industry reachable for BIPOC and first-gen students.

Put your money where your mouth is. Donating money to a smaller university isn't as expensive as you would think. Funding an analytics workshop for $5,000 or a research center for $10,000 can help pique students' interest in the MR field.

Pay your interns a decent hourly wage. Speaking of money, pay your interns! Most first-gen students are working while in college because they have to help with essential needs at home (e.g., parents' mortgage, rent, food, etc.). They simply cannot work for free. We also encourage transparency in the job description by stating your hourly internship wages. If it's a possibility, let candidates know that the internship can be extended if the relationship works out. Would you be willing to give up your current permanent position right now for a temporary opportunity? This is a scary proposition and one that most first-gen students have to consider when thinking about internships. Make it less daunting by being upfront about the benefits.

Partner with a small school and contribute to an MR class on a project. Interested in seeing more students have a specific skill set or wish MR candidates knew a specific program? Consider partnering with a regional institution that has small classroom sizes. Small = agile. Most regional schools are able to quickly add to the curriculum and have the nimbleness to modify course offerings. If you think that more students should know how to manipulate text analytics in R, for example, find a regional school and see what you can do to contribute to a classroom project that might incorporate R. Not only will you make an impact in students' lives, you'll also help develop your talent pipeline with the skill sets that you need.

Make videos highlighting interesting techniques or case studies. Students love seeing day-in-the-life videos. They want to see what types of projects people are working on so that they can get an idea of what the job entails. Utilizing your firm's social media channels for inexpensive videos like this is the perfect way to connect with curious undergrads.

Just as important

Retaining BIPOC applicants is just as important a step as recruitment. Here are some ways to keep your new hires happy.

Employee resource groups are crucial for retention. BIPOC and first-gen students are known victims of imposter syndrome – they often feel like frauds despite all of their accomplishments. Creating and maintaining employee resource groups (ERGs) is critical in BIPOC retention. Our former students frequently call us after they start working at leading firms and tell us: they don't look like everyone else; they don't talk like everyone else; and they don't feel like they fit in, despite the fact that they are doing amazing work. They often feel like outsiders and aren't sure how to gain confidence in their careers once they're there. Ultimately, these feelings make them consider quitting. This is where ERGs are critical. Whether it's a group of BIPOC employees, a hobby club or a continuing education group, ERGs help with engagement and a sense of belonging and this is an important step to retaining BIPOC and first-gen students.

Assign each new employee three onboarding partners at different seniority levels. The saying "different strokes for different folks" also applies to mentors and onboarding partners. We all know the benefits of a mentor but what if that person is a partner at a large corporation and isn't exactly accessible? Or what if you have a question that is not appropriate for a senior-level director? Knowing how to dress for the company gala, for example, is a legitimate concern, but definitely not a question for your senior director. Or what if you just aren't connecting with your assigned mentor? By having three different mentors, the employee is more likely to find someone who clicks with their personality. Moreover, multiple layers of mentorship give entry-level talent, in particular first-gen students, the support necessary to successfully navigate the professional working world, allowing you to retain them. First-gen students typically do not have the coaching at home that one would expect. It is not unusual for a first-gen student to need extra coaching on how to handle conflict in the workplace, how to dress or how to ask for PTO. That's where these mentors can help.

Attracts and retains

Diverse candidates for your marketing research jobs are out there! We see them in our classrooms every day. By following the above tips you'll ensure that your company attracts and retains a hardworking generation of future insights professionals.

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Fighting the daily grind

To improve employee research, rethink the currency of the employee experience

| By John Goodman, Scott M. Broetzmann and Ted Nardin

snapshot

Employee surveys often measure the wrong things and should instead focus more on addressing the factors that contribute to workplace satisfaction.

“The annual employment survey needs to be retired. The reason companies do these surveys…remains as important as ever. But workers don’t like the surveys and often won’t respond to them, and most companies don’t do anything with the results anyway.” [1]

So argues Wharton’s Peter Cappelli in his August 2020, Wall Street Journal article, “It’s time to get rid of employee surveys.”

While Cappelli is spot-on in suggesting that the traditional employee survey has increasingly deteriorated into a tick-the-HR-box, low-ROI exercise, our work points to an alternative and more powerful solution for reinvigorating employee surveys: reframing the employee experience around the concepts of “meaningful work” and “internal service frustrations.”

Cappelli contends that conventional employee surveys have generally outlived their usefulness and should be jettisoned for at least five principal reasons. And while each justification has some relative merit, we believe that the greater shortcomings of orthodox employee surveys have more to do with flawed execution and stale conceptual grounding than they do the intrinsic weaknesses of more formal, in-depth annual employee surveys. Perhaps a better approach to revitalizing employee surveys is to meet those distinct challenges head on rather than dismissing the “old way” of conducting employee surveys altogether. Consider Cappelli’s chief criticisms of employee surveys:

Annual employee surveys are too long. Cappelli argues that employee surveys often have too many questions to maintain respondent interest (which he suggests leads to the second weakness of low response rates from the overall employee base). We view this as a design issue that can be avoided through better science (e.g., more emphasis on deriving key metrics to be included vs. set aside). As well, our experience with employee and customer surveys shows that poorly designed and uninteresting surveys (from the vantage point of employees) are more damaging to response rates than is the absolute length of the questionnaire (within a reasonable band of survey length, of course).

Employees either don't respond in sufficient numbers or fail to share honest feedback on an annual employee survey. It is correct to note that poorly designed and executed internal surveys do indeed risk lower participation rates from employees who fear retribution for their honesty. Two considerations come to mind for assuaging this form of employee skepticism. First, tactically speaking, there are plenty of methodological avenues for conducting surveys that maintain anonymity (e.g., the use of internal controls or a third-party survey firm who can control snooping, ensuring that analysis never proceeds to a level of granularity that can permit identification of individuals). Second, where there's smoke, there's fire. When and if employees don't respond to a survey because they believe it will imperil their job, it reflects more on the absence of trust in leadership than the survey methodology itself.

The results of an annual employee survey aren't representative of the broader employee population. Cappelli asserts the numerous failings of the old-fashioned employee survey ultimately result in a response rate that is so low as to render the results unreliable. While it is generally true that a higher response rate engenders more trust in the results (both statistically and managerially), and the higher the response rate the better from a face-validity perspective, a 50% response rate (the example of a low response rate cited by Cappelli) isn't a death blow for the results of an annual employee survey. (It depends on both the size of the employee population as well as the representativeness of the 50% who did respond.) Regardless, well-designed surveys can yield response rates of 70% or greater if they are "authentic" and address the barriers to being able to do one's job – considerations like empowerment, a lack of critical information and support from other departments.

The focus of the typical annual employee survey or the magnitude of the "fix" often preclude actions. Cappelli suggests that oftentimes, leadership doesn't act on employee survey results because the problem is too big to fix or no one in the organization is accountable for the issue at hand. The burden of responsibility here lies with leadership creativity and follow-through. So, for example, using Cappelli's example, maybe the food in the cafeteria could not be fixed today due to the constraints of the existing contract but it could certainly be renegotiated in the next contract (or what about bringing in food trucks now and then?).

Leadership rarely acts on the results of annual employee surveys. Cappelli is absolutely right in his declaration that executives frequently ignore the most important step in any survey: taking action on the results. We have observed that senior leaders fail to act on survey results – whether they be related to employee or customer feedback – because the presentation of those results fails to capture their imagination and confidence (or as Cappelli notes, they aren't "interested"). Numbers in a vacuum – without a story that shows the cost of inaction – aren't worth much to the C-suite. There are two design issues with which to contend here. First, the questionnaire design process should facilitate the use of items that are specific enough to be actionable but broad enough to avoid an unnecessarily longer questionnaire. If the sentiments and focus of the survey questions are too general and abstract, then the results will be too broad to encourage action. Second, the organization must be intentional about securing buy-in to the overarching objective (action and change). We've found that when executives are pre-committed to addressing at least some of the problems in advance, action is more likely to ensue.

These considerations aside, Cappelli's alternatives to the annual employee survey – "a new approach" – are not without their own baggage. For example:

Field pulse surveys that only ask about two or three things at a time. Cappelli opines that pulse surveys – those two- or three-question, pop-up-style surveys – are a legitimate substitute for conventional employee surveys. We've observed many a pulse survey that achieves a poor response rate and provides data so general and out of context as to be uninterpretable at best or dangerous at worst. And we're not so sure that the "death by papercut" approach to surveys (i.e., fielding a routine drumbeat of two- or three-question surveys in virtual perpetuity) is a better solution. Finally, believe it or not, most companies are worse at integrating data from multiple surveys than they are at striving to act on survey results.

Analyze exit interviews. Cappelli considers the sentiments shared by employees in exit interviews to be a suitable source of information to fill the void left by abandoning employee surveys. While exit interviews may be useful for enriching an understanding of employee sentiment, they often suffer from the same challenges endemic to employee surveys: the absence of action to address the issues raised. Spain and Groysberg (2016) found that "two-thirds of existing programs appear to be mostly talk with little productive follow-up" and that it wasn't unexpected to hear from those companies conducting exit interviews that "…exit interviews have a negative return on investment."[2] Not to mention, exit interviews look into the rearview mirror and often miss identifying critical annoyance issues (i.e., concerns that were aggravating but not the primary two or three things that led to the exit). For instance, while an employee might resign for a new job that pays $1.50 more per hour more at another company, perhaps that pay increase would not have been very attractive if the employee felt recognized and saw a clear career path at the incumbent company. These important and contributing secondary weaknesses are often lost in perfunctory exit interviews.

Use tools like project management software to identify bottlenecks. Like the authors, Cappelli recommends companies not become overly reliant on survey results as their only source of feedback. Our work on voice of the customer (VoC) best practices tangibly demonstrates that companies that use and effectively integrate multiple sources of feedback achieve a notably higher return on investment for their VoC efforts. However, in this instance, while knowledge about any individual project management bottleneck can produce useful data, the impediments specific to any particular project are more likely to pertain to process improvements and may prove difficult to link directly to broader employee satisfaction, engagement or contentment. Conversely, using the employee survey platform we advocate is more likely to expose organization-wide bottlenecks that create systemic employee dissatisfaction.

Monitor employee chat rooms and employee e-mails. Since most companies already monitor employee e-mail and are increasingly creating community chat facilities, Cappelli says, why not create a systematic process for monitoring and reporting on the chatter about company policies and procedures? Although applying text analytics to employee chat rooms and e-mail exchanges might certainly produce some useful data, doesn't this seem to be as great a violation of privacy as the lack of anonymity with regular employee surveys? Moreover, it is entirely likely that the representativeness of these data may be considerably more skewed than employee surveys (e.g., are those who post on these channels the "typical" employee?).

Sometimes misguided

The spirit of Cappelli's crusade for a better methodology for garnering and acting on employee feedback is one we share. Like their kin, customer surveys, employee surveys are sometimes misguided and often poorly executed. Ironically, when employee surveys do go wrong, they are – in many cases – either a predictable outcome of the insular culture from which they stem or a byproduct of blindly implementing so called best practices.[3]

Based on our collective cross-industry work with companies in their quest to reinvent the traditional employee survey, we are increasingly convinced that organizations can get the highest return on their employee survey investment when it is hinged on three important principles: 1) people want meaningful work; 2) there is value in uncovering the internal service frustrations that employees contend with that stimulate "grind" – our term for the small and large workplace interactions and occurrences that chip away at internal morale – as grind devalues meaningful work and can in turn diminish the customer experience; and 3) the ability to act on survey results rests on establishing a formal action planning process.

Cappelli accurately states that neither employee happiness nor engagement effectively predicts job performance. He could have gone further to point out that those measures also fail to reliably predict an employee's intent to quit, as well as their intent to connect with customers (relevant for those of us in a service-related industry). A far more compelling approach includes measuring the opportunity for meaningful work and, perhaps more important, identifying the things that destroy it. Our studies show that, together, meaningful work and grind can predict over 65% of an employee's intent to quit and their intent to engage with customers.

Meaningful work is operationalized as the realization of moments with distinct purpose that arise from the act of serving others and which are beyond what an individual is compensated to produce. The defining characteristic of meaningfulness is that a person's work makes a difference in someone's life. Meaningful moments do not happen in rapid-fire succession, occurring instead on a less frequent yet periodic basis. These moments add up over time and build to a felt sense that work is meaningful overall. Without that sense, work becomes the opposite – meaningless. Employee surveying is critical to determine how much opportunity exists for meaningful moments to occur and whether meaningful work is promoted generally by the corporate culture.

However, promoting meaningful work is not enough because there are opposing forces – grind – that destroy the meaning employees find in their jobs. Simply put, grind is the sum of all things that inhibit employees from doing their job, acting as a hindrance to easily and effectively helping others. Grind is the leading cause of frustration, stress and anxiety that arises from the very work employees are tasked with accomplishing. Identifying and eliminating grind is paramount to improving the employee experience.

Hazards and detours

If creating a culture and workplace grounded in meaningful work is the eventual destination, then perhaps it is the internal service frustrations employees grapple with every day that represent the hazards and detours along the employee experience journey.

Internal service frustrations are the aggravations that employees experience and feel while serving internal and external customers. These frustrations stem from tacit and explicit institutional barriers that the company has erected in the form of imprudent policies and practices related to people, processes and technology. Internal service frustrations devalue meaningful work, induce grind and contribute to decreased customer satisfaction and loyalty.

The most effective employee surveys are designed to unearth and compel action to mitigate these frustrations. Our work suggests four considerations are especially important when incorporating an internal service frustrations perspective into the employee survey.

First, developing a credible aided list of possible internal service frustrations that may be experienced when serving internal and external customers is essential (sometimes referred to as pain points). Presenting employees with a list of 50 to 70 frustrations (across the various company functions) and asking them to identify any and all hassles they have encountered (as well as their most important frustration) is a surefire method for gaining insights into the full range and relative importance of internal service frustrations. The list can be developed from interviews or focus groups with employees, as well as customer complaints about dealing with employees. Moreover, since handling an unhappy customer (internal or external) is among the more stressful interactions an employee can have, reviewing and responding to the list of frustrations presented on the survey can be intensely relevant and engaging for employees.

Second, if the survey results are to provide a well-rounded and actionable view of the employee experience, then a multifaceted set of metrics is imperative. As we have noted prior, fielding multiple stand-alone pulse surveys – each focused on a different domain of the employee experience – may not be the best answer. Instead, we advocate for the use of a single, integrated employee survey that examines the natural and weighty interactions between perceptions of meaningful work and grind, internal service frustrations, the service culture of the organization and key outcome metrics (e.g., overall employee satisfaction and loyalty, engagement). Designed correctly, a unified survey such as this can be completed in less than 10 minutes and provides a panoramic view of how to transform the employee experience.

Third, one of the more effectual means of engaging leadership and earning their commitment to eradicating frustrations is to cast and prioritize employee hassle factors in terms of their impact on customers, the amount of time that they waste and the severity of damage they cause to employee loyalty (or engagement). This form of calibrating and prioritizing frustrations is powerful in the C-suite and relatively simple to do (by adding in no more than three additional questions regarding the employee's most important frustration). Imagine the stark difference between a business case for change that rests on listing the top 10 employee frustrations and a presentation of employee frustrations that are associated with thousands of hours of wasted time.

Finally, while there is no substitute for a formal and intentional action-planning process we describe below, it is vital that senior leadership pre-commit to taking action. Management must accept that there will always be some bad news and heavy lifting. Some of the greatest progress we've seen in engineering a better employee experience has occurred in companies which were top-ranked in quality and service

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We have found that attacking the barriers that impede employees' ability to deliver service (whether their customer is internal or external) provides very actionable data. Moreover, there are at least two added benefits to adapting the employee survey to pinpoint internal service frustrations.

First, these data regarding employee frustrations often map directly to the customer experience. We typically observe a 50% to 70% overlap between the service frustrations called out by employees and the disappointments expressed by customers. As a result, the identification and mitigation of internal service hassles can create a win-win-win for the company, customers and employees.

Second, if "success" here – framed as an ability to locate and eliminate frustrations – is paired with an employee recognition effort, there is some evidence that employees will respond favorably. Zak's (2017) research,[4] has shown that when employees have flexibility in executing processes (which can be tagged to using their input from the internal service frustrations survey to drive flexibility and change) and they receive ongoing recognition for their excellence, they have higher oxytocin levels in the brain and higher agreement levels with the statement, "I look forward to coming to work each day."

Act on those results

It's one thing to field a survey and gain insights into the employee experience. It's an entirely different matter to act on those results. In his treatise on the impotence so many companies experience when grappling with employee survey results, Cappelli rightly notes the mode response of leadership to most employee surveys ranges from overt denial to indifference.

Our work with market leaders on their employee and customer surveys corroborates this seemingly natural tendency toward inaction; taking action on survey results is more the exception than the rule. Even among companies that tick all of the technical best-practices boxes for increasing survey impact, many still fail in their attempt to positively influence the employee and customer experience because they lack a process to connect the dots between the survey findings and operational accountability. Intentionally operationalizing meaningful changes in business practices is a compulsory event that we commonly refer to as action planning. While the survey locus – as employee or customer – may differ, the process of taking action is the same.

Assuming that the ultimate goal of any survey is to contribute to a positive, incremental and sustainable improvement (in the employee or customer), action planning is the magic elixir to bring about this outcome. It is the antidote to complacency. As we define it, action planning is the intentional and ongoing process of identifying, operationalizing and implementing specific actions that affect enough employees or customers, over a long enough period of time, to increase positive ratings for those selected elements of the employee or customer experience that yield the greatest payoff.

Quantifying this payoff is critical to priority-setting and gaining the resources needed as well as the buy-in of the action-planning team. The good news is that there are three ways of quantifying the impact that can be translated into financial terms. First, each employee pain point can be associated with the time wasted on workarounds each time the issue arises (times the number of occurrences per month). Secondly, impact on external, revenue-producing customers can be quantified. Finally, impact on employee loyalty and turnover can be estimated and rank-ordered. The combined output can then be presented as, "For each month we do not address this employee pain point, it is costing us approximately $X thousand." Quantifying the cost of inaction for a month usually precipitates action.[5]

Tactically, action planning consists of a formal, face-to-face or virtual gathering of a cross-functional group of key stakeholders (as few as eight and as many as 50) engaged in a day-long facilitated session focused on three to five priorities for action that have been identified by the survey. Strategically, action planning is an ideation effort; it is the connective tissue between the survey findings/recommendations and the change in organizational behaviors. The various methodologies for implementing this facilitated event are plentiful (e.g., brainstorming techniques, visualization practices, etc.).

Regardless of the methodologies used, the critical point is to ensure that an action-planning effort is in place and process metrics are identified to track progress. We find that action planning dramatically increases the ROI that companies can earn for their survey investments by ensuring that they focus finite resources on – and act on – what matters most to employees and customers. When compared against companies that do not implement a formal action-planning process, companies that engage in formal action planning are significantly more likely to achieve sustainable increases in key outcome measures (e.g., employee engagement, customer satisfaction and loyalty), achieve those notable gains more quickly and at a lower cost and ensure that the survey results are integrated into the culture of the organization.

Transforming the experience

While conventional employee surveys have earned well-deserved cynicism, we believe that companies should pursue alternative approaches that have been demonstrated to be successful rather than throwing the baby out with the bathwater. Concentrating employee surveys around the concept of meaningful work and internal service frustrations, quantifying the monthly cost of ignoring the frustrations and pairing that perspective with intentional action offers corporate leaders a lifeline to transforming the employee (and customer) experience.

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Tell us a little bit about yourself

Questions to ask your sampling partner

| By Ted Pulsifer

snapshot

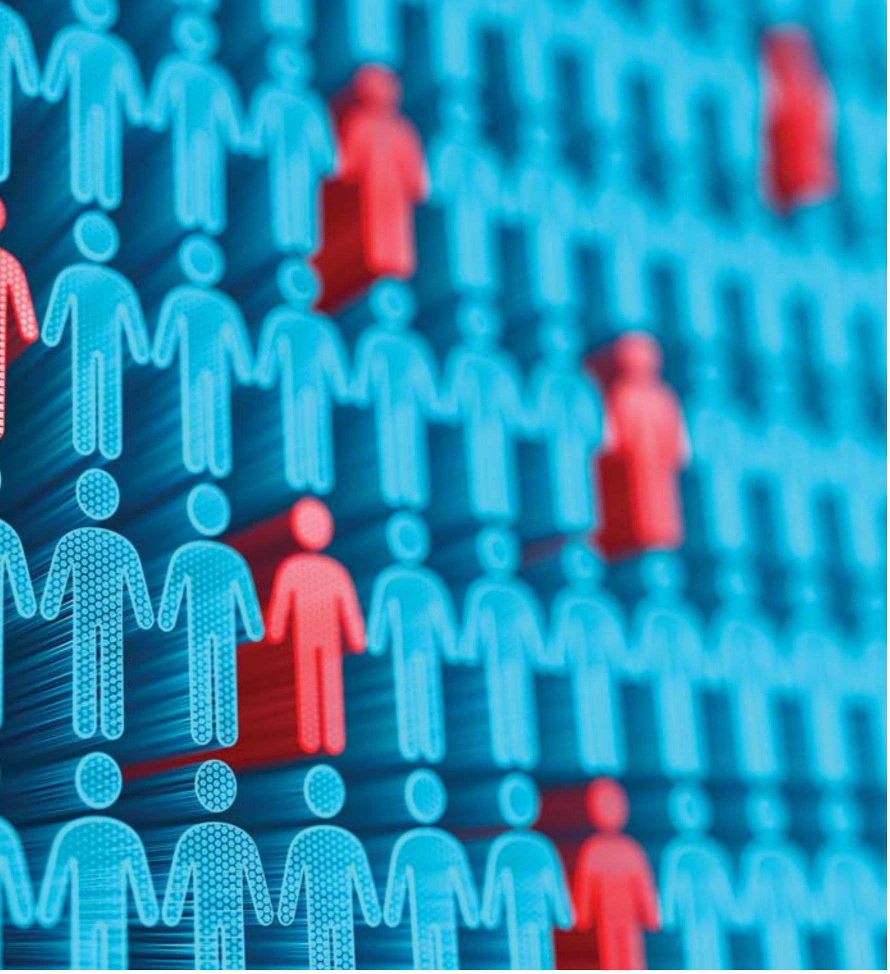
Ted Pulsifer outlines how to find an online sample provider that fits your objectives.

Respondent opinions and experiences are the drivers of strategic business decisions. Some suppliers, more than others, have invested in strategies that support the recognized need for a wide and diverse pool of research participants who trust the process and are engaged. Winning respondent trust is not easy; consumers are learning the value of their data and hold companies that deal in their privacy accountable. Panelists are entitled to know what will become of their personal data. Greater transparency between sample providers and participants has become a vital part of the equation.

The respondent experience also remains a principal focus for our industry. The most successful providers have been relentlessly pursuing innovative ways to shorten surveys and improve engagement to ensure respondents trust and enjoy the panel membership and the survey process. This includes guiding survey designers towards doing their part to create positive survey experiences that will drive trust with consumers.

Technology has spawned numerous segments among the general population based on how they want to engage with surveys. New solutions have allowed for more personalized experiences for a wide variety of respondents. It is a two-way street – both research companies and panel owners are adapting to the use of automation and machine intelligence to attract, manage and retain respondents. Sample providers are upgrading their portals to ensure a seamless experience across devices (smartphones, tablets, desktops). It doesn't end there. Everything from matching respondents with the most suitable surveys to incentive management is becoming automated. Leveraging technology for human-centric interaction and engagement will deliver an augmented respondent experience.

The online sampling industry has made major strides in recent years. The most noteworthy has been the automation of project specifications and quota communication. Programmatic sampling is helping research providers not just run surveys faster and at a lower cost but also improve data quality. With deeply profiled panel data shared via APIs, both sample buyers and sellers are aligned on the benefits for survey outcomes, mini-



mizing answer bias and reducing respondent dropouts. Soon, the programmatic approach will also permeate other steps in the sample delivery value chain, including continuous profiling at deeper levels (emotional, psychographic, etc.), feasibility assessment, accessing hard-to-reach audiences and incentive management.

On a new track

The COVID-19 pandemic has put our lives on a new track. The most significant and irreversible change has been the accelerated shift to digital, with adoption and increased use of online accounts and researching and buying more items online. There is an increased focus on health and wellbeing and on financial health. There are changes in when an individual will want to take a survey; changes in their profile information; changes to topics, products and services they will want to engage on and the channels they use to engage with us. Brands are already noticing the shift in their consumer sets and at the same time, panel owners need to be continually engaging with panel members for profile updates and testing recruiting and engagement methods and channels.

Schlesinger Group recently polled 18,000 panel members across the nine countries – U.S., U.K., Canada, Germany, France, Italy, Spain, China and Brazil. Forty-five percent of respondents have been taking more surveys during the pandemic vs. 13% who had less time for participating in surveys; 91% of respondents shared they are participating in the panel engagement activities such as contests, polls and quizzes. Unexpectedly, use of mobile devices for taking surveys had also increased for 37% of respondents, despite most people staying home.

In a world of markets experiencing massive disruption and evolution, gathering reliable and compelling data for deeper insights is paramount for brand success. Choosing your partner for sample delivered at the quality, speed and scale you need nationally or across the globe is a key factor in gathering actionable data for a valuable return on research investments. Understanding the trends that influence quality, speed and reliability will help you ensure your decision criteria are relevant to overcome today's research challenges.

Daunting process

Choosing a panel partner can be a daunting process. Panel owners vary by their industry, panel demographics, respondent quality, incentive mechanisms, panel management, etc. This short guide provides you with a framework for a primary focus, along with key considerations to help you identify the best panel partner for your objectives.

Understanding panel composition for representative sample and on-target types

Explore panel size and diversity

Panel strength is the key determining factor for faster time to market and high-quality data. As a researcher, you should know the panel size and diversity in your countries of research. For example, if you are aware that a panel composition is more skewed towards males or has lower representation from a particular geography or income level, you would have to normalize the data to adjust for those differences. This level of information is also important to understand your potential reach to nationwide and hard-to-reach audiences. Depending on the audience of your surveys, explore the B2B and B2C panel strengths individually.

- Does your panel partner cover enough countries to contribute significantly to your project mix?
- For your target countries, does the provider have a sufficient sample population with online access?
- For B2C panels, does the provider have sufficient respondents across age, gender, household income, education, location and job title?
- For B2B panels, can the provider access your specific employment status and the organization's employee strength?

Ask about the panel recruitment methodologies

As a research buyer, you expect a diverse panel that provides the least possible bias. You require

a pool of respondents who are not just interested in the incentive but also in sharing their opinions. The key differentiator among panel owners is their recruitment method; some are still using traditional channels, while others have expanded their outreach via a multipronged strategy. In addition to the traditional methods such as e-mail, telephone and referrals, the newer approaches, collectively known as river recruiting (affiliates, social media, online ads, gaming apps), help onboard people across a wide range of demographics, behaviors, and preferences.

- What channels does the provider deploy for recruitment? (You are looking for a mix of methods to ensure diversity in demographics and of interests and behaviors.)
- Did the provider custom-build the panel or did they purchase an existing panel?
- Does any part of the panel comprise a purchased list? And, if so, do they keep these members as a separate panel?

Assess the depth of panelist profile data
Owing to brand advertisements that create more choice, people are clustering around their micropreferences. And those cluster members are in flux as people continuously change preferences. So, it's important to assess both the depth of panelist profiles and the frequency of updates. Mapping panelist preferences is the key to finding the best-fit panelists for your surveys. Most panel owners use onboarding questionnaires for understanding their panelist lifestyle and preferences – anything from their favorite footwear to sustainable buying to hobbies and interests. Panelist profile data enriches survey responses by allowing a granular understanding of your market. We recommend you explore:

- How many consumer, B2B and health care profiles are collected in the database?
- What type of profiling questions are asked and how often are they updated?
- What type of information is collected on the panelists (demographic, psychographic, firmographic, etc.)?
- In addition to the onboarding questionnaire, what mechanisms are used for ongoing deep profiling?
- Can panelist profile information be shared in real time?

Assurances of data quality

Understand the processes for rigorous verification
As a researcher, how can you be assured panelists are truly who they say they are? Although panel owners and independent technology firms have developed a plethora of tools and technologies for panelist vetting, the effectiveness can vary. It is crucial to understand how your panel partner verifies panel candidates and monitors their in-survey behavior. Some panel owners use technologies from Imperium, Maxmind and Sample Chain to verify panelists. Others develop data science-based tools to verify panelists and map their survey activity across devices, browsers and geographic locations.

- Which third-party partners are used to verify panelists?
- What in-house processes are deployed for identity verification, fraudster prevention, cross-panel de-duplication and redirect-fraud prevention?
- Is survey behavior mapped to eliminate fraudulent panelists and undesirable behaviors?
- Is a respondent quality-tracking system in place?

Ensure there is meaningful engagement by panelists
With a multitude of attention-grabbing entertainment platforms in the marketplace, considerable effort is required to keep panelists engaged. Here are the three ways panel owners keep respondents coming back to take surveys and share authentic survey responses.

Respondent incentives. Learn about the incentivization programs in place. Does your panel partner have a wide range of rewards to match the needs of diverse panel groups? What may be attractive for a 45-year-old female in the suburbs of Chicago may not hold the same value for a 24-year-old male in downtown San Francisco. Choice, speed of delivery and customization are three essential levers in creating respondent incentive satisfaction. Data science and process automation are the key to aligning incentives and delivering them promptly. Ensure that your panel partner has effective and streamlined processes for incentive management.

- What type of incentives are available for panelists?
- Is there a system for incentive choice?
- How is an appropriate incentive determined?
- How are incentives delivered?

Panelist motivation. Inquire about unique ways in which your panel partner motivates their panels and communities. Leading panel communities are customized around member demographics and interests. If the panel comprises both B2B and B2C members, are the messaging and conversations customized for them? Also, explore how actively the panel partner is communicating with them on social media. As a good practice, panel companies run frequent contests, polls, quizzes, games, etc., to engage their panelists.

- How frequent are panelist engagement programs?
- Is there communication with panelists outside of research interactions?
- On which channels are panel communities most active?
- What is the mix of long-term panelists vs. short-term panelists?

- What is the mix of high-frequency vs. low-frequency survey participants?

Panel and survey experience. It is indubitable that a positive survey experience leads to better survey outcomes, completion rates and future participation and to the good standing of marketing research. Survey platforms should be appropriately branded to build trust and present a purpose. Some providers go as far as to create portal personalization. Given the range of online user behaviors, it is important to evaluate the user experience across major device formats.

- Does their panel portal have a unique brand identity?
- Is the brand identity consistent across all touchpoints such as e-mail, social media, incentive delivery, etc.?
- Does the panel owner provide an optimized user experience across device formats (mobile, desktop, tablets)?
- Does the provider give guidance around survey questionnaire design and length and design concerns that may impede the survey experience?

What will you get? The sample delivery

Speed of delivery: explore programmatic sampling capabilities. With the programmatically delivered sample, you can field surveys faster, create client reports more easily and reduce human error, all while minimizing sampling costs. No one panel owner can provide the sample needed to reach every type of global participant. To address this, large sample marketplaces have made programmatic buying and selling of sample mainstream but as a responsible research buyer, you will wish to evaluate your panel partner's capability to deliver sample seamlessly via APIs – the software intermediaries that allow multiple panel applications to talk to each other.

- Does the provider leverage APIs to connect you with leading panels to deliver sample?
- Can their panel portal be easily integrated with your research platform?

Participation quality: request sample performance data. Request metrics that will allow you to feel confident in sample performance. Ask your panel partner for data on: reconciliation rate (percentage of completed interviews that were reconciled to being not complete); number of active respondents in the last 90 days; total completes in the last month and the last 12 months; average number of unique panelists visiting the panel portal daily; annual panel attrition rate; percentage of attrition that is replenished annually.

Operational reliability: ask about expertise and processes. No matter the advancements in programmatic technology, seamless delivery of projects and high-quality outcomes require an experienced team for bidding and project management, along with operating to effective processes. Evaluate how your panel partner is adhering to in-house processes and is compliant with industry codes and international regulations. If your panels originate from other countries, keep a checklist of regulations that you and your panel owners need to meet.

- How many years of industry experience does your provider have?
- What is the average time of bid turnaround?
- What is the average time to field?
- How does your provider manage compliance around GDPR, COPPA, HIPPA, FERPA, etc.?
- Who is accountable for compliance and how is it monitored?

And how will you feel when you have got it?

The experience. No matter the advancements in technology-driven sampling, it takes talented people who are deeply customer-centric to deliver consistent experiences and outcomes that take relationships beyond the transactional to form trusted partnerships. Getting the sample and data you need should be the minimum you should expect. Ask yourself what added value you seek, what you require that goes beyond a project success, what will help you grow, what allows you to sleep at night and what proves your partner has an uncompromising commitment to get you there. Start by asking:

- What are your guiding principles for your customer experience?
- What is the ratio of the bid team to the project management team?
- What is your escalation procedure?
- How does the provider track and act on their customer experience performance?
- How are preferred partnership agreements established?

A telling indication

Being curious is key to mapping your path to achieve exceptional research outcomes. The extent to which your provider welcomes your questions will be a telling indication of the quality of your future partnership. Your provider should have impressive and reassuring answers to your questions, which focus on panel quality and diversity, minimizing sample bias, recruitment and verification capabilities and the programmatic technology to manage quality and speed across multiple sources.

The above questions are best suited for the initial assessment of the panel partner. An additional in-depth resource for your evaluation process is a sample provider's answers to ESOMAR's 28 Questions to Help Buyers of Online Samples.

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••• brand research

Accelerating recovery

Using research to manage a brand crisis

| By Rex Repass and Michael Lieberman

snapshot

Research should be a major part of any effort to repair a brand's reputation, the authors argue, and they offer strategies for making that happen.

Benjamin Franklin once said, "Glass, china and reputation are easily cracked and never well mended." In a global economy, 24/7 news cycle and ubiquitous social media culture, reputations in the 21st century are just as fragile.

The corporations, brands and people that recover from fractured reputations are those that recognize the importance of transparency and getting in front of the narrative when a crisis occurs.

Every crisis is different, from Merck's drug Vioxx, Toyota's faulty gas pedal or Chipotle's E. coli outbreaks to online data breaches and celebrity faux pas. Some crises that impact a reputation do not begin as evident brand bloopers or celebrity scandals. Examples include the Pepsi Kendall Jenner ad. Or when KFC ran out of chicken in the U.K. Or the February 2017 online post from Bradley Reid asking why his wife Nanette had been fired from the Cracker Barrel job she'd held for 11 years. (It wasn't long before the hashtag #JusticeforBradsWife began trending.)

Many brands hit bumps and have public relations nightmares but quick, transparent and insightful crisis communication research can lead to a faster and more holistic recovery than trying to hide, defend or ignore the situation at hand. Effective crisis management requires a multi-tiered response. In this article, we will focus on the research aspect of a crisis management response, stopping short of media strategy and follow-up investigations.

Field a study immediately

A crisis breaks and the call comes from the client or the client's legal counsel to a consulting firm and research team. The first thing to do is to field a study immediately, preferably before the crisis permeates the media. This study should establish top brand equities, what we like to call "brand love."

Every brand has brand equities. The goal of this initial phase of research is to get a baseline of the client's strongest brand equity – the

one likely to survive the crisis – and the potential initial damage to that attribute. For example, Honda is known as a reliable company committed to high quality. Chipotle, before its brand crisis, was known for "food with integrity."

This research should also include hypotheticals that may occur during the crisis. Ask respondents their perceptions and attitudes about the client's brand and other brands in the category. Next, ask about the brand attributes and monitor to see which ones go up or down and which attributes help maintain brand strength. For example, if Honda had a crisis, its safety measure may go down but "committed to high quality" may retain its brand-lifting strength. This would be a key finding.

Ensuring the health, safety and morale of employees should not be forgotten. Conversations between employees are a powerful word-of-mouth crisis response tool and almost always make it into the media.

When the crisis unfolds, treat it like a political campaign. There must be a strategic plan and a rapid-response team in place. One person is in charge and the hard roles of what each player should be doing and what they should not be doing are developed and assigned. The lead crisis campaign manager must enforce these roles. Usually, the players include the following:

- C-suite, general counsel and/or outside legal counsel
- crisis communication counsel for strategy and message development
- pollster/opinion research, consumer insights lead
- strategic marketing/communications director

Once the team is in place, a second study is usually conducted to test messaging concepts and messengers. How are brand equities holding up? Who should deliver the message? It's important to keep an eye on the public conversation through techniques such as social network analysis. What is the buzz on Twitter and other social media platforms?

Conduct a tracking survey so that the brand conversation becomes a narrative, not just a snapshot in time. As the crisis evolves and the corporate response begins, brand equities will either remain constant, decline or improve. Chipotle salvaged its "food with integrity" label. Toyota regained being dependable while retaining its innovative company image.

Unexpected issues will emerge requiring answers that may impact corporate reputation and the brand. Measurement of the brand, tracking and reputation studies will provide answers. Some of the more important deliverables include the following:

- brand perception
- consumer propensity measures
- developing an understanding of how bad the crisis could get
- measurement of the reach of the negative message to understand the real threat (different research methods)

The research should be a guide to the media strategy and the team needs to take stock of the situation across marketing, communications and digital conversations as well as the effect on brand preference and future sales. When and where are things changing? Retaining brand strength and constantly measuring the change in brand equity is important.

A well-known recent corporate crisis is the 2009-2011 Toyota vehicle recalls, which involved three separate but related recalls. Toyota initiated the recalls, the first two with the assistance of the U.S. National Highway Traffic Safety Administration (NHTSA), after reports that several vehicles experienced unintended acceleration.

Toyota, a company that built a world-class corporate brand reputation based on quality, manufacturing and design excellence, reliability and customer focus, obviously faced a major threat to its reputation. What was its response? It launched the Toyota Strategic Initiative to determine how the recalls had affected its image. The first step was to assess the recall issue among consumers regarding the company's image, identity and reputation.

Figure 1

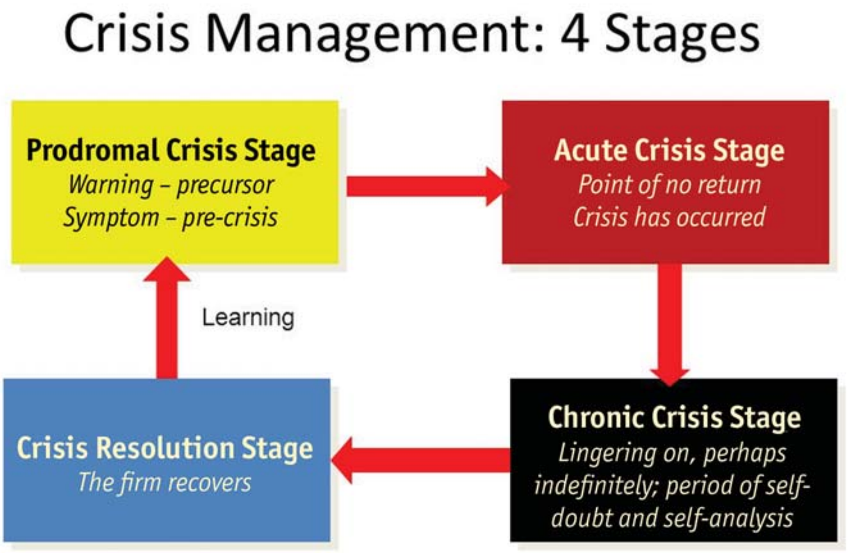
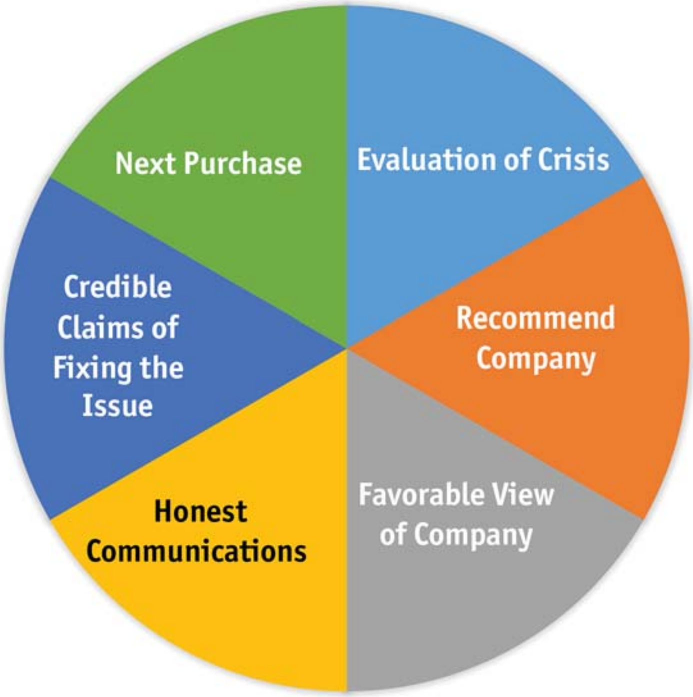

Crisis Management: 4 Stages
Prodromal Crisis Stage
Warning – precursor
Symptom – pre-crisis
Acute Crisis Stage
Point of no return
Crisis has occurred
Learning
Chronic Crisis Stage
Lingering on, perhaps indefinitely; period of self-doubt and self-analysis
Crisis Resolution Stage
The firm recovers

Figure 2: Elements of a Crisis-Management Questionnaire


Next Purchase
Evaluation of Crisis
Credible Claims of Fixing the Issue
Recommend Company
Honest Communications
Favorable View of Company

When an organization is facing a crisis, key factors that need to be considered are its audience, the type of crisis the organization is facing and the stage in the issue's life cycle the crisis is in (Figure 1). With so much at risk, company leadership must choose the most appropriate response strategy to lessen the threat of the crisis.

Figure 2 shows the key elements of an effective crisis management corporate study. Within this frame, the company – such as Toyota – can evaluate its situation as the storm breaks and within subsequent waves.

When researching its crisis response, Toyota also considered key stakeholders. These included opinion elites, Toyota owners and the general public. Quite often multivariate analysis will uncover different drivers of key reputation elements, such as honesty of communications and ongoing positive brand equity relative to competitive automotive brands.

In its initial research after the recalls, as expected, Toyota's safety and trust attributes declined. However, the company's brand attributes related to innovation remained stable.

In the second study after a crisis, it's important to test many messages and collect data over a finite time period. During this phase, Toyota began to see equities that remained favorable during the crisis including attributes related to dependability and reliability.

An analysis of Toyota's senior leadership crisis response revealed the prevalence of two major themes, namely defense and future action. The first was for the NHTSA to provide context as to why the company was slow in taking corrective action.

The theme of future action focused on the company's history of innovation and quality engineering, with a sub-theme of a commitment to improvement in customer service, quality and safety.

Understand and measure

As illustrated in the Toyota example, companies that recover from a crisis are those that thoroughly understand the underlying facts that caused the crisis, systematically measure the effects on consumer opinion and manage their reputation through timely, forthright communications with the public, customers, other stakeholder groups and the media.

As for Benjamin Franklin, he understood the importance of reputation and the resources required to mend those that are broken. Research-based consumer insights combined with strategic communications are effective tools for repairing, protecting and enhancing corporate and brand reputations.

Rex Repass is president of Research America Inc. He can be reached at rexr@researchamericainc.com. Michael Lieberman is founder and president of Multivariate Solutions, a statistical consulting firm. He can be reached at michael@mvsolution.com.

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The American Marketing Association will hold its 2021 Leadership Summit on May 13-15 as a virtual event. Visit www.ama.org/events/general/2021-ama-leadership-summit.

The Insights Association will hold its NEXT 2021 event as a virtual conference on May 18-19. Visit www.insightsassociation.org/conference/next-2021.

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

Strategy Institute will hold its 11th Annual Digital Marketing for Financial Services Summit - Canada on June 15-16 as a virtual event. Visit www.financialdigitalmarketing.com.

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.

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The Merlien Institute will hold its 2021 QUAL 360 NA event on June 16-17 as a virtual event. Visit na.qual360.com.

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The American Marketing Association will hold its 2021 Marketing and Public Policy Conference on June 24-25 as a virtual event. Visit www.ama.org/events/academic/2021-ama-marketing-and-public-policy-conference.

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

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The Insights Association will hold the X Event 2021 on August 3-4. Visit www.insightsassociation.org/conference/x-event-0.

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

Quirk's Media will host Webinar Wednesday on October 13. Visit quirks.com/events/webinar-wednesday-10-13-21.

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/conference/crc-2021.

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

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

The 2021 Quirk's Event – New York will be held on November 2-3 at the Javits Center in New York. Visit www.thequirksevent.com.

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

Quirk's Media will host Webinar Wednesday on November 17. Visit quirks.com/events/webinar-wednesday-11-17-21.

The Insights Association will hold CONVERGE 2021 on December 7-8. Visit www.insightsassociation.org/conference/converge-2021.

Quirk's Media will host Webinar Wednesday on December 15. Visit quirks.com/events/webinar-wednesday-12-15-21.

Event details as of April 5, 2021. Please see websites for more details.

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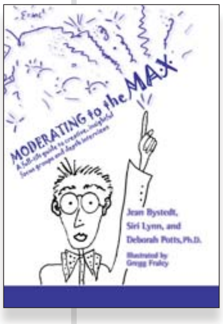
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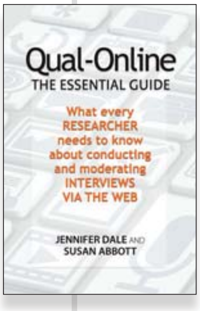
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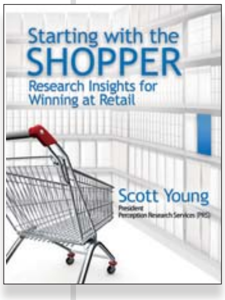
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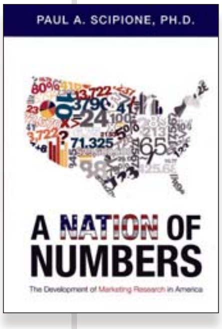
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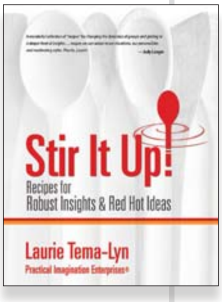
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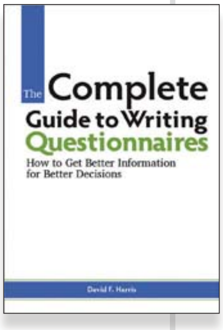
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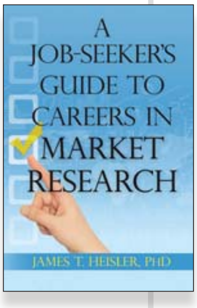
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Quirk's Marketing Research Review, (ISSN 08937451) is published bi-monthly - Jan/Feb, Mar/Apr, May/Jun, Jul/Aug, Sep/Oct, Nov/Dec - by Quirk Enterprises Inc., 4662 Slater Road, Eagan, MN 55122. Mailing address: P.O. Box 22268, St. Paul, MN 55122. Tel.: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

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

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10 minutes with...

Mark Bartkiewicz

Consumer Insights, Macy's

Mark Bartkiewicz

> *"My advice for researchers interested in doing virtual qual is to be nimble and be prepared for technical difficulties."*

How has your experience taking improv classes impacted your role as a researcher?

One skill I have found to be particularly important throughout my career is influence. At Macy's, I advocate for the customer voice through the development and presentation of insights to drive actionable change in the organization. This entails using persuasive communication skills to help colleagues make research-driven decisions. Improv is great at preparing you for this as it puts one in unpredictable situations. In one scene I might play a student learning the alphabet in a kindergarten classroom and in another I might play a pilot who is learning how to fly. Regardless of the scenario I was put in – and in hindsight, many scenarios were hilariously far-fetched – a common thread in improv was listening, teamwork and pivoting on the fly. Given that much of my time at work is spent infusing the voice of the customer into decision-making across functions, improv has made me a more collaborative and engaged business partner.

Do you have any tips for researchers looking to improve their approach to virtual qual in 2021?

In 2020 COVID-19 shifted qual research exclusively online. I ran virtual qual projects prior to the pandemic but the bulk of qual research I ran was conducted in-person – focus groups, shop-alongs, in-store intercepts, etc. – all largely in support of optimizing our store experience. Virtual qual comes with some challenges but also a few advantages. My advice for researchers interested in doing virtual qual is to be nimble and be prepared for technical difficulties. If you are running multiple sessions – e.g., multiple online focus groups – my recommendation is to think of your first session as a dry run and avoid inviting observers outside of your core insights team. That way, any technical issues or discussion guide kinks can be ironed out prior to other business partners joining later sessions. While traditional in-person focus group observers have limited contact with the moderator, online focus groups allow the moderator to see desired probes from observers in real-time. This provides for a great opportunity to engage with internal partners and probe on certain topics in real-time. That said, even though virtual qual technology is improving, my hope is that over time virtual qual platforms can become less glitchy as well as more cost-effective – particularly the more innovative solutions like VR.

What excites you about coming to work each day?

Prior to joining Macy's, I spent three years at Ogilvy running market research studies for clients across a wide array of industries. Transitioning from agency to client-side has been very fulfilling in that I am involved in decision-making on strategies from soup to nuts. What excites me about coming to work every day is seeing the impact of insights-driven recommendations come to life – whether it be related to our loyalty program, digital experience, advertising, seasonal campaigns, etc. As a people leader, I am also committed and excited about mentoring the next generation of insights trailblazers by honing their storytelling skills and providing them opportunities for visibility and growth in the organization.

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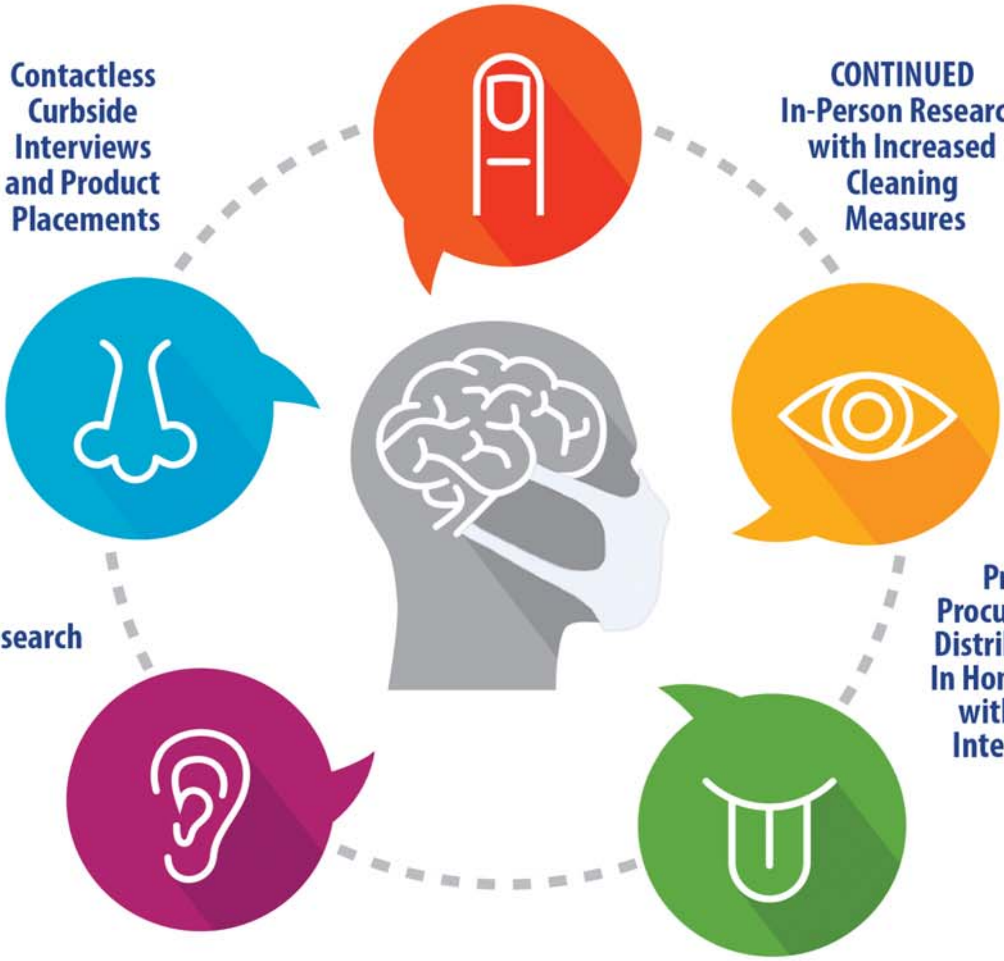

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