QUIRK'S

For marketing research and insights professionals

DIGITAL ETHNOGRAPHY

DIVING DEEP FROM A DISTANCE

PLUS

Implicit methods power Duracell battery research

What does cultural empathy mean for insights pros?

Calculating the value of what researchers do

Quirk's Marketing Research Review
July/August 2021
Volume XXXV Number 4
www.quirks.com

Matt (Client Solutions):
“Sue, I would like to remind our clients that we also do awesome quant work.”

Sue (Marketing):
“Okay, Matt.”

SCHLESINGER
GROUP

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Research on researchers

Don't miss Quirk's Q Report, published each September. The report provides a snapshot of the compensation landscape throughout the marketing research industry and shares the results of our corporate research survey.

This year, we'll be digging into a variety of topics, including:

- trends in research and methodology
- diversity in the workplace
- the return to the office
- changes to salary and compensation
- post-pandemic employment

The purpose of the report is to give client-side researchers a look into their world, helping them learn more about what their peers and colleagues are doing and also benchmark themselves and their departments.

// E-newsworthy

Quantifying the value of customer experience
https://bit.ly/3iidU0q

Gen Z: Work, wealth and post-pandemic life
https://bit.ly/3iejGju

Reinventing normal: COVID-19
https://bit.ly/3uVnJDY

// Noted Posts

Quirk's Blog

After the pandemic: E-commerce, subscriptions and services
https://bit.ly/3fQKapv

Looking ahead: COVID-19
https://bit.ly/2S9Q7VB

Research Industry Voices

Making the connection: A guide to customer immersion sessions
https://bit.ly/3wXYyC4

The role of trained ethnographers in a world of selfies
https://bit.ly/3pneKKQ

Conducting marketing research with kids: Get on their level
https://bit.ly/3uR4BqK

Will post-COVID consumers be revenge shopping?
https://bit.ly/3vThH8i

Research Careers Blog

How a zero-sum mind-set can undermine workplace negotiations
https://bit.ly/2SVznkX

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Engaging employees as brand ambassadors
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••• automotive research

Vehicle shoppers willing to pay for cleaner interior surfaces and air

The pandemic-fueled need to clean frequently touched surfaces extends to automobile interiors, to the point of potentially influencing future car and truck purchases, according to a December 2020 survey of 500 vehicle users in each of the global automotive core markets of the U.S., Germany, China and Japan by Japan-based chemical company Asahi Kasei.

Asked about their preferences in regard to the future automotive interior, respondents expressed a readiness to pay for solutions that provide safe surfaces and air inside the car. Nearly 90% of U.S. respondents looking to purchase a large or luxury vehicle would be willing to spend $750 for a "surface protect" package (a hypothetical, optional package with interior materials that provide antiviral/antimicrobial properties and stain- and odor-resistance) and nearly 80% of prospective truck and SUV buyers would be willing to spend the same amount.

A similar finding was seen in regard to car interior air quality. Nearly 90% of U.S. respondents looking to purchase a large or luxury vehicle and over 80% of truck and SUV buyers would be willing to spend $750 for a "cabin protect" package (a hypothetical, optional package including an automated ventilation system that eliminates microbes and pathogens in cabin air).

••• shopper insights

Study identifies back-to-school shopping struggles

The 2021-2022 back-to-school season is quickly approaching and parents, students and teachers alike are grappling with unconfirmed plans for virtual, physical and hybrid classrooms, leading to confusion of what back-to-school supplies they actually need.

Data services company Inmar Intelligence surveyed over 1,000 U.S. consumers to better understand how they are preparing for the upcoming school year and the challenges they're facing. Marketers who take note of these issues can earn customer loyalty by providing solutions to shoppers' thorniest problems.

Among the top-cited difficulties: 43 percent of shoppers struggle to plan/make/pack lunches and snacks for school; 42 percent struggle with making dinners after school; 42 percent of shoppers have a hard time finding healthy options for lunches and snacks; 40 percent struggle to balance virtual school with work; 37 percent are challenged by planning/scheduling after-school activities; and 36 percent of students and teachers struggle to stay organized in their classes.

How do shoppers plan to make their purchases? Many are opting for a hybrid approach. For school supplies, 35 percent of shoppers will buy online and 60 percent will buy in-store. Apparel shopping will also be a mix of online (53 percent) and in-store (56 percent).

Values are the new drivers of customer loyalty

Perspectives from Ron Ruffinott of Toluna

It's become clear that we're not going back to normal. How can brands engage customers in this new climate?

Brand loyalty is more important than ever and today's consumers are more inclined to support brands whose values align with their own. In fact, Toluna's recent Barometer showed that 57% of consumers are more likely to buy from a brand that aligns with their values, while 38% have stopped shopping with brands that don't.

The same research showed that more than half (51%) of consumers prioritize sustainability and environmental friendliness as a core value. Humanitarian issues (34%) and supporting racial equality (27%) and gender equality (26%) are also key issues for consumers. Traditional brand values continue to remain important, such as customer support (48%) and value for money (47%); however, these shifting attitudes show that consumers are demanding much more than good service.

How do brands appeal to consumers' values?

With values increasingly more important to today's consumer, brands must demonstrate that they stand for something – to participate in culture, society and politics; to show that they are environmentally friendly or support humanitarian issues.

Purchasing behaviors are now motivated by these myriad factors and consumers expect brands to communicate how they fit with these values. It's natural that consumer loyalties will align with brands that understand what's important to them.

tolunacorporate.com
hi@toluna.com

How do we measure brand health when change is constant?

In order to effectively measure brand health, the way in which we measure it must fundamentally change. Traditional legacy models will simply no longer be useful in this rapidly changing environment. Anymore, we can't simply score a brand on its past or current successes. As consumer sentiment changes faster than ever, we need a new model to measure brand health that also determines whether a brand is perceived to be relevant to consumers in the future.

Big name brands might be rated as having very strong brand health on the traditional model, but when their future relevance is considered, their score drops significantly. Conversely, disruptor brands who don't have any current success to measure might have very strong future relevance and therefore receive a higher score.

Is customer loyalty a thing of the past?

Customer loyalty isn't dead – but the things that drive loyalty have been permanently altered. Values now sway purchasing decisions more than ever, so brands need to clearly communicate where they stand to attract customers that align with those values. The only way to do this is for brands to have access to accurate, on-demand consumer insights that will enable them to truly understand what's important for their customers today while helping them understand what will be important to them in future. Knowledge is power and the more understanding and data brands can put behind their strategic decisions, the more they can mitigate the risk attached to those decisions and build long-term customer loyalty.

By Joseph Rydholm, Quirk's Editor

Quirk's Events ready to roll

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Joe Rydholm can be reached at joe@quirks.com

At the time of this writing in early June, we here at Quirk's have just made the transition back to the office after nearly 15 months away. While I'll miss many aspects of working from home, the fact that we are back in the office is a sign that things are slowly getting back to normal. There's still a long way to go in terms of vaccinations and herd immunity but each day it feels like in-person interaction is less and less fraught – which has me excited for the return of in-person Quirk's Events.

We were perhaps a bit too optimistic and ambitious when we first announced that our 2021 slate of events in London, New York and Chicago would mark a return to in-person gatherings. Indeed, earlier this year we rescheduled the London event from July to October when it became clear that a summer meeting wasn't in the cards.

But from where we now sit, it appears the world will be ready in the fall. Along with large-scale conventions and business gatherings, concert tours and other cultural events are starting to creep back into our schedules, with late summer and early autumn looking wonderfully busy.

With that as a preamble, here's an update on our plans for the 2021 Quirk's Events (www.thequirksevent.com). (Rest assured that all safety precautions will be observed and the events will follow local- and facility-imposed procedures and practices related to COVID-19.)

Chicago (September 30-October 1): Our inaugural 2019 Chicago event drew over 1,300 attendees and our 2020 event had over 1,500 registrations before it was cancelled due to COVID-19. We expect at minimum 600 registrations this year but are shooting for between 750 and 1,000. It is possible, however, that due to pent-up demand and a new, more central downtown Chicago location (Hyatt Regency Chicago), we could match or exceed our earlier numbers. Data from the first year in Chicago indicated that about 60% of our attendees were from the Chicago area and commuted from home. So even if there are still corporate travel bans in the autumn, we're hoping the majority of our attendees will be able to attend. With a price point of around $100 for end-client registrations for all of our events, cost should not be an obstacle to registration either!

London (October 13-14): The 2020 London event had more than 1,375 registrations, a nearly 10% increase over our inaugural London 2019 event. As with Chicago, we're aiming for a minimum of 600 registrations this year but are targeting 750 to 1,000. Even in regular, non-pandemic years, the London audience registers late – generally in the final three weeks before the event. About 80% of past London attendees were from the London area so, again, even with corporate travel bans, we assume most will be able to make it. And the low-cost end-client registration fees (around £100) are manageable even if companies have cut back on funding for professional development.

New York (November 2-3): The 2020 Brooklyn event – held in March just before the COVID-driven shutdown – was a sellout – over 1,375 registrations – our highest attendance on record. For 2021, we've moved out of Brooklyn to Manhattan's Javits Center. Past-event data for New York shows that about 70% of attendees were from the New York metro area. Fingers crossed here too that any existing late-autumn corporate travel bans won't stop researchers from attending. Nor should the price!

Openings for presenters

While our client-side speaking slots are filling up nicely, we do still have some openings for presenters at all three events, so please let me know if you are interested in speaking. Sessions are 30 minutes and just about anything related to life and work as a corporate marketing researcher is fair game as a topic.

We look forward to seeing you this fall!

ASK THE **EXPERT**

Expert answers to important research questions.

How can researchers apply implicit testing in a way that provides the right insights to help speed innovation?

As researchers, most of us have heard of or used implicit testing to find insights about human behavior, and in turn, use those insights to attempt to become more successful in the marketplace. By utilizing specific implicit and explicit testing techniques in a variety of applications, you can create deeper insights that uncover more truthful, even subconscious, "whys" behind consumer behavior and preferences.

To uncover the whys into behavior, InsightsNow developed a neuroscience technique we call The Implicit/Explicit Test™. This patent-pending technique gets around the biases and errors in judgment that come from asking participants directly why they do things. Instead, we test their reactions to cues to ascertain positive or negative reactions and whether that reaction is implicit (fast and irrational) or explicit (slow and rational). To determine whether a reaction is implicit, we first establish a calibration for the cutoff time for what is an implicit reaction for each person. When you take this test a step further – and use it as a calibration made at the beginning of each respondent engagement – you will gain a new level of data for decision-making. It allows a percentage identification of fast implicit reactions versus slow explicit reactions. This is quite valuable because it provides a measure of how large of a percentage of the population will react a certain way.

The power of this technique is in its application to research projects. We often will prime participants through homework that places them in a moment or context that makes relevant memories accessible for implicit or explicit thinking. The results of this technique have been amazing in application. Combined with relevant priming, The Implicit/Explicit Test generates insights that help, for example, product developers know how to design products that consumers will intuitively recognize as delivering the brand promise. And marketers are able to create more impactful messaging or create effective brand architectures.

So what are the ways the broad methodology of The Implicit/Explicit Test can help you go beyond just measuring response time? Some applications to consider include:

- Incorporate this implicit testing approach in analyses to deepen insights.
- Use the test to drive survey logic, branching to specific questions to drill into the whys of implicit or explicit responses.
- Create automation in the design of metrics for custom syndicated solutions.
- Provide a new class of behavioral key performance indicators for more accurate business decisions.
- Create new industry standards for supply-chain alignment against consumer perceptions and behavioral reactions.

David Lundahl, Ph.D.
CEO and Founder
InsightsNow
dave.lundahl@insightsnow.com

insightsNOW

- The Implicit/Explicit Test deepens and broadens insights into the reactions of people to products and messages. It helps marketers, product developers and innovators make faster, better decisions. It helps researchers identify what will nudge current behaviors and habits as well as what will disrupt behavior.

For more information, visit lphs.insightsnow.com/implicit-ebook.

Have a question you'd like to have answered? Submit it to info@quirks.com.
Want your firm to be featured as an expert? Contact sales@quirks.com for more information.

QUIRK'S Hot List

Meet some of the companies, people and products that are driving the marketing research industry forward! They are the influencers in the industry, finding new ways to innovate and constantly pushing research and insights to be better and faster.

Leader in qualitative market research recruitment

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Technology-driven research execution

SAM PISANI, MANAGING PARTNER, LOGIT GROUP

Sam Pisani embodies the passion that the Logit team brings to research execution. From building a dynamic team of research execution professionals to staying on the forefront of technological, methodological and regulatory trends, Sam's vision has always been to reinvent and reinvigorate data collection within the research industry.

Sam understands that our clients are striving for a competitive edge, which is why he stresses continuous investment in both platform- and methodology-based advancement. This ensures that the data Logit collects is leveraged to further advance their products and services and/or to provide their customers with a better experience.

Under Sam's leadership, the Logit Group was named to the 2020 GRIT Top 50 list as one of the most innovative companies in market research.

Sam is helping to shape the future of insights through the launch of innovative products like Zamplia, an all-in-one, API-driven sample platform; Q-FI, an insights generation and data visualization enhancement platform; and Votified, the first real-time online voter profiling tool.

Sam also hosts our new Logit Influencer Series webinar, focused on the trends and technological advancements that are making a meaningful impact on the MR space.

He also takes an approach of being both flexible and methodologically agnostic, avoiding the potential pitfalls of being too rigid – if all he does is manufacture hammers, everything will start looking like a nail.

That's why Sam Pisani is not only a truly holistic research practitioner but he's also an industry thought leader whose insights both add value for clients and galvanize Logit's overarching mission of being an innovative, technology-driven MR firm.

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QUIRK'S Hot List

Educating the next generation of research and insights leaders

STEPHEN KRAUS, PH.D., EXECUTIVE DIRECTOR, MARKET RESEARCH INSTITUTE INTERNATIONAL (MRII)

One of the oldest and most prestigious educational institutes in market research has a new leader: insights expert Dr. Stephen Kraus.

MRII is a nonprofit devoted to educating the world's next generation of research and insights leaders. The courses it offers in cooperation with the University of Georgia form the basis of certificate programs endorsed by leading associations such as the Insights Association and its webinar series with ESOMAR is one of the most popular in the industry.

Steve brings a wealth of experience to the role. He's led custom research engagements, run three major syndicated studies and led thought leadership efforts at big-data startups. He's written three books and given a TED talk. Steve also has a Ph.D. in social psychology from Harvard University and currently teaches marketing at the University of San Francisco.

"Becoming executive director of MRII is the culmination of my career," said Dr. Kraus. "It's an opportunity to use all of my experience to help researchers around the world learn more, advance their careers and advance the science of data-driven decision-making."

www.mrii.org
1-415-350-5553

Executive recruiting for the MR industry

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For Candidates:

Outgrown your role or just ready to try something new? Quirk's Talent can help you find your next position in the marketing research and insights industry. You can rely on us to find you the perfect job. There's no cost to you – it's like having a personal talent manager in your corner! And with a job market this hot, you're sure to find your ideal workplace.

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Uniting the MR industry

MARKETING RESEARCH EDUCATION FOUNDATION

What's hot? Giving back to those in need.

We are fortunate to work in an industry with bright and well-educated people. But there are so many in this world who don't have access to the same educational opportunities afforded us. The Marketing Research Education Foundation (MREF) was founded in 2015 to unite the marketing research industry around educating underserved children worldwide. To date we have distributed over $500,000 to programs that serve at-risk children.

Show the industry that your company is philanthropic by joining our great cause.

Diamond Member (limited availability)
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- Priority participation in service trips

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- Priority participation in service trips

Silver Member
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- Company logo on MREF booth at trade shows
- Badge for e-mail signature
- Opportunity for a guest byline in the MREF quarterly newsletter; offer testimonials and additional PR
- Priority participation in service trips

Bronze Member
- $1,000 donation commitment
- Company logo on supporter page of MREF website
- Company logo on MREF booth at trade shows
- Badge for e-mail signature
- Opportunity to offer testimonials for MREF website
- Priority participation in service trips

MREF Friend
- $250+ donation commitment
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IN FOCUS

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

// Survey Monitor

••• real estate research

Homebuyer's remorse

Many new homeowners have regrets but Millennials lead the pack

With the current surging housing market, it's not surprising that many buyers find they've closed on a house that doesn't quite fit their budget or needs. According to a Bankrate.com article by Zach Wichter, this has been particularly true for Millennials, who report having the most regret after buying a home.

Buyer's remorse has become even more prevalent during the pandemic, when the pressure to buy a home has felt greater than before. That desperation has led to many buyers purchase a home before realizing it wasn't right for them. This regret can be divided broadly into financial and physical and it isn't the same across generations. For the most part, older buyers are less likely to have misgivings about their purchase after the fact. In fact, just 33% of Baby Boomer buyers have some regrets about their purchase compared to 64% of Millennials.

A major regret among all recent homebuyers was being ill-prepared for maintenance and other costs associated with homeownership. More than 20% of Millennial homeowners said they felt the costs of homeownership were too high and that number jumped to 26% among younger Millennials, ages 25-31.

Millennials were also the most likely to say they didn't get a good mortgage rate or that they overpaid for property. Twelve percent of Millennials said their rates were too high and 13% said they agreed to a sale price that was more than it should have been.

While financial frustrations topped the list of regrets for new homebuyers, many survey respondents said they also came to realize their new place was literally not the right fit. Millennials again were the most likely to be unhappy with their new home's physical characteristics. Fifteen percent of respondents from that generation said they disliked their new property's location. Meanwhile, around 30% felt the home was not the right size.

The study was conducted by YouGov on behalf of Bankrate.com and polled 2,653 adults from April 21-23, 2021.

••• food research

Feeling fried

Americans are busier than ever, including in the kitchen

American are spending more time in their kitchens than ever but they're also feeling increasingly overwhelmed by the day's obligations. According to a Pampered Chef survey, 65% of Americans say they are in their kitchens even more than in years past, with that same amount reporting they also feel more overwhelmed every day or at least once or twice a week with everything they need to do. In fact, one in five say they will always make time to cook, even if it leads to feeling more overwhelmed.

Nearly 30% of respondents say they forget about cooking when they are overwhelmed. In the last half of 2020, 36% shared that they have been trying at least one new recipe each week and are loving it, while 64% expressed they have been looking for meal hacks, are reheating foods, have lost their joy in the kitchen or order takeout. On

average, those who believe cooking has become an overwhelming challenge or chore have felt that way for nearly six months and significantly more females (25%) than males (8%) have felt that way for more than one year. Those with kids under the age of 18 appear to be struggling more in the kitchen and are twice as likely to say that cooking has become an overwhelming challenge and chore than those with older children.

While so many respondents feel burned out on their cooking duties, 80% of households have a primary cook, revealing that most families do not share the cooking responsibilities. Additionally, parents with children under the age of 18 will not typically share mealtime responsibilities (83%). Interestingly, only 5% will pass the cooking responsibility to somebody else when they are feeling overwhelmed.

Despite one person carrying the majority of cooking duties at home, only about four in 10 (37%) said they feel comfortable and confident in their cooking abilities. Six in 10 credit practice and repetition (60%) and having the right resources to complete a task (56%) for driving higher confidence. Self-expectations of being able to do more or better (44%) – which is stronger for females (48%) than males (41%) – along with too many responsibilities (37%) and lack of time (32%) are the biggest contributors to feeling less confident.

Half of the respondents report that a parent (34%) or someone else in their family (16%) primarily taught them to cook, while 16% might just be winging it, claiming that no one taught them how to cook. Interestingly, having a good role model to follow contributes to feeling more confident (33%) and at least 43% seek cooking inspiration from family recipes and traditions. People in the South are significantly more likely (one in four) to say they primarily learned how to cook from someone else in their family such as grandparents, aunts and uncles, than other regions of the country.

Ultimately, seven in 10 Americans report that providing a healthy, nutritious meal and having a meal while connecting with loved ones are the most enjoyable phases of mealtime. Only 16% shared that they enjoyed cleaning up the kitchen in comparison to other mealtime phases, with 42% saying it is their least enjoyable task. Yet many respondents (nearly 42%) were most likely to say a clean kitchen is a good reflection of themselves. Interestingly, 43% report that cleaning also falls by the wayside when they feel overwhelmed.

The survey was conducted by Bridge Market Research LLC on behalf of Pampered Chef in January 2021 with a sample of 1,001 Americans aged 25-54.

••• small business

Looking forward

Small businesses predict near-future recovery

There's no question that the past year has put small businesses through the wringer. But many businesses have adapted and are looking toward the future as vaccines and relaxed restrictions offer hope – and maybe even new jobs.

Sage surveyed small-business decision makers in the U.S., U.K. and France and found that three-quarters of small businesses are optimistic about the future of their business and growth trajectory in the next year. Optimism is mainly driven by the vaccine rollout program (45%), the return of in-person customer engagement (35%) and projections of increased consumer spending (32%). Over eight in 10 small businesses do not expect another lockdown, with most feeling optimistic that their business will return to pre-pandemic levels this summer – both in terms of profitability and staffing. In fact, 81% of small businesses across markets believe they will return to pre-pandemic profitability this summer. This confidence is led by the U.S. (82%), followed closely by the U.K. (79%).

An ability to adapt was critical during the pandemic. Many (60%) small businesses say that they have coped well with the barriers COVID-19 placed on them, making big changes to how they operate. Most commonly, in the U.S., 38% of small businesses said they cut overhead costs and, because of further financial barriers, 27% said they relied on their savings to make it through. This behavior was also reflected in the U.K., with 35% cutting overhead costs and 25% relying on savings. In France, the figure was 35% and 21%, respectively.

Small businesses turned to technology to overcome difficulties and create efficiencies within the business. In fact, 76% of small businesses say they rely on technology. In the U.S., 64% used new technology to sell more and stay connected with customers or improve how they operate. French small businesses used technology similarly to those in the U.S. (67%), while 52% of those in the U.K. also invested in new technologies, nearly all of whom said this increased investment improved their business.

Renewed optimism is driving hiring plans and as small businesses grow their workforce, they will continue to look at how they can increase diversity and prioritize employee well-being. One-third of small businesses are expected to hire in 2021, which could create millions of jobs. When applied to ONS data on employment from small businesses, this could mean 4.6 million more jobs in the U.S., 2.4 million in France and 1.2 million in the U.K.

Since the start of the pandemic, small businesses have been thinking more about their wider role in society, ranging from supporting employee well-being initiatives and environmental sustainability initiatives to prioritizing diversity in recruiting – with many small businesses expected

to make further improvements in the upcoming year. Small businesses across the globe are increasing their focus on ways of working and employee wellness with 47% of small businesses in the U.S. improving flexible working, 37% of those in the U.K. increasing support for physical wellness and 34% of French small businesses modifying recruitment initiatives to prioritize diversity.

The study was conducted by Sage and polled small business decision makers in the U.S. (4,156), U.K. (2,144) and France (1,008).

••• automotive research

Driving home the message

Awareness is key for autonomous vehicle push

The thought of an autonomous or self-driving vehicle is a somewhat scary concept. However, it's also scary to share the road with irresponsible or distracted drivers. According to a recent poll by Ipsos, respondents say they encounter distracted drivers on 52% of their drives, though this number jumped to 62% among those who drive 25 miles or more a day. With autonomous cars increasing driver safety, vehicle owners in the U.S., China, Germany and Brazil remain steady in their interest in autonomous driving in 2021, with the most interest among consumers in China (78%), followed by Brazil (61%), Germany (34%) and the U.S. (31%).

Awareness is critical, however. The Ipsos Mobility Navigator study shows that Americans who have experience (riding or driving) using semi-autonomous features indicated a three-times increase in interest in getting a vehicle with an autonomous driving functionality. In the U.S., awareness or willingness to try a semi-autonomous car remains low but is gaining traction. While there is still a minority who have used semi-autonomous features, the key is to expand this exposure. Among vehicle owners who have driven or ridden in a semi-autonomous vehicle, 65% express interest in purchasing one themselves, compared to 23% who have no prior experience. The number of U.S. vehicle owners who have driven or ridden in a vehicle that uses semi-autonomous features is slowly creeping up – in 2021, this number is 19%, compared to 17% in 2020 and 11% in 2019.

Safety has always been an important factor in automotive decision-making but clearly that definition is changing and increasing in importance. Most accidents are human error and occur as a direct result of vehicles being operated by distracted drivers – and the number of potential distractions is only increasing.

A solution to this growing issue is highlighting semi-autonomous features and making consumers aware of the safety benefits they offer. This will directly correlate to demand and usage of the semi-autonomous functionality.

The survey was conducted by Ipsos and polled new vehicle owners aged 18-74 in the U.S. (2,000), China (1,000), Japan (1,000), Brazil (1,000) and Germany (1,000).

••• restaurant research

Digital dining

Canadians favor takeout and mobile payments at restaurants

Canadians' return to restaurant dining will look a little different than it did before, according to a survey by Clover from Fiserv. With the pandemic pushing a shift to digital ordering at the table and delivery, many Canadians have grown to favor these options.

Among Gen Z and Millennial respondents, 57% said they'd prefer to order and pay at the table using their own mobile device rather than through a server. The younger generations are not alone, as more than one-third (35%) of those aged 35 to 54 said the same. In addition, 31% of 18-to-34-year-olds and 10% of 35-to-54-year-olds would be more likely to frequent a restaurant that offers this payment option.

The pandemic has also created a penchant for delivery. Prior to the pandemic half of Canadians (51%) ordered takeout or delivery one to two times every month. Since the start of the pandemic, about the same number of Canadians (52%) order takeout or delivery one to two times a week, more than quadrupling the frequency. And 11% order takeout or delivery three or more times every week, a figure that rises to 19% among 18-to-34-year-olds. This newfound habit might stick too. Nearly one-quarter (24%) of Canadians said they'll choose takeout and delivery over in-person dining in 2021, even when restaurants reopen.

The survey was conducted by Maru/Blue on behalf of Clover from Fiserv and polled 1,507 Canadians in March 2021.

••• financial services

The age of crypto

In the UAE, young Emirati are driving interest for cryptocurrency

Despite the volatile history of cryptocurrencies, demand for these assets has remained high – especially in the United Arab Emirates (UAE). According to a YouGov and Holborn Assets survey of over 1,000 UAE residents, Emirati are particularly keen on investing in crypto with 33% expressing interest, more than Arab expats (23%), Asian residents (24%) and Westerners (19%).

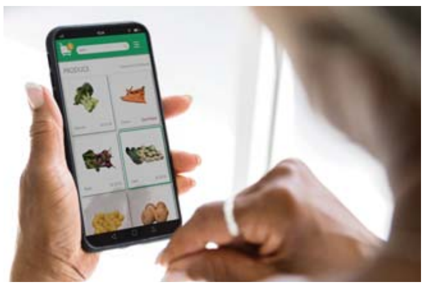
One in four (26%) respondents view these assets as offering "exciting investment opportunities," while 45% want more education before they invest. Eighteen percent view cryptocurrency as a passing fad and 11% say they need to be heavily regulated.

Reflecting this demand, 44% of the 830 respondents to a question on asset allocation said they would feel comfortable with over 5% of their investment portfolio invested in cryptocurrencies in 2021. This figure was over 10% for nearly one in five (18%) UAE residents.

The differences in survey responses across different sections of society in the UAE are particularly noteworthy. For instance, 18-to-24-year-olds are the most bullish on cryptocurrencies, with a third of respondents considering them to be "exciting investment opportunities," compared with 17% in the 45+ age group. Meanwhile, only 10% of the youngest age group wants these assets to be heavily regulated, versus 17% for older investors. And while just 12% of young respondents consider crypto assets to be a fad, this rises to 20% among the 45-year-olds and above.

The interest in regulations differs across nationality as well, with only 7% of Emirati wanting crypto assets to be heavily regulated, compared with nearly one in four Western expats (24%). There is also a marked gap in comfort levels among UAE investors when buying crypto assets. A third of Emirati respondents, for instance, said a 5-10% allocation would suit them, with 19% opting for a 0-2% holding. For Western expats, by contrast, 51% of respondents said they would only allocate 0-2% to cryptocurrencies and just 14% would be comfortable with a 5-10% allocation.

The study was conducted by YouGov on behalf of Holborn Assets and polled 1,000 UAE residents.



••• shopper insights

A blended approach

Grocery shoppers love online but brick-and-mortar isn't going anywhere

The pandemic made many online grocery shoppers out of folks who had previously only shopped in stores and for some, time savings will motivate them to continue to shop online. However, the store is far from dead. In fact, consumers are increasingly favoring a blended store-online grocery shopping approach.

PowerReviews conducted a study among grocery shoppers to better understand these trends and the factors that make shoppers favor one method over the other. Within the three months leading up to the survey, which was conducted in February and March 2021, 73% of consumers had purchased grocery items online compared to 17% in 2017, representing growth of 4.3 times. Looking at just the past year, 61% of consumers shop for groceries online more now than they did pre-COVID-19. But it's not just the pandemic driving consumers online. The top reasons for online shopping include time savings (59%), personal safety (49%) and avoiding impulse purchases (31%). Shoppers still favor their usual stores, though – ordering directly from a local grocery store (as opposed to online-only ordering services such as Instacart or Amazon Fresh) is the most popular way to shop for groceries online, with 65% of consumers reporting they've purchased groceries this way.

As much as consumers appreciate online shopping, brick-and-mortar grocery is alive and well. Ninety-three percent of consumers had made an in-store grocery purchase within the most recent three months of being surveyed and 95% of consumers who shopped for groceries online have also made an in-store grocery purchase within the same time period.

Across online and in-store shopping, ratings and reviews positively impact the behavior of shoppers. Eighty-two percent of online grocery shoppers say they read reviews at least occasionally and 83% of consumers are at least somewhat interested in accessing product ratings and reviews when they're considering a new product while shopping in a brick-and-mortar grocery store. Seventy-eight percent of online grocery shoppers are more likely to purchase a new grocery item if customer reviews exist for that product. The figure is 64% among in-store shoppers.

The study was conducted in February and March 2021 by PowerReviews and surveyed 7,916 active grocery shoppers across the U.S.

special advertising section

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Founded 2003 | 8 employees
Anne E. Beall, Ph.D., CEO

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www.beallrt.com

Branded Research Inc.

Founded 2012 | 35 employees
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C&C Market Research

Founded 1992 | 500 employees
Thomas Morrison, Project Director

C&C Market Research is a U.S.-based data collection agency that has been fielding quantitative research projects since the '80s and is the complete answer to all of your data collection needs. The quantitative face-to-face recruiting and interviewing that C&C provides allows for unparalleled market research, specifically sensory testing, that simply cannot be duplicated online. This personal interaction, combined with the ability of each of our 35 offices spread across the U.S. to run online studies via their proprietary databases/community panels, creates a wealth of easily accessible consumers for your next project. For over 30 years our data collection specialists and field locations, coupled with our proprietary programming and data transmission capabilities, have ensured countless successful projects for all our clients. We have remained a leader in today's marketplace through hard work, ingenuity, dedication to quality and the ability to adapt in these ever-changing times. Please call or e-mail us and we can help with your next project!

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Founded 1987 | 200+ employees
Dennis Barbelet, Senior Vice President

As one of the nation's largest and most respected consumer product testing companies, CRG delivers unprecedented access to the consumer population through a wide range of discovery methods: mall intercepts, pre-recruiting, attitudinal and behavior research, in-depth interviews, online research and surveys, panel development and management, and custom and multi-lingual surveys. Additionally, our research expertise focuses on CLTs, home-use, product usage, packaging, consumption, focus groups, sensory evaluations and all facets of online and offline data collection. Our mixed-mode approach to recruitment and data collection quite often allows us to provide access to respondents and insights that are otherwise unreachable.

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Sean Bisceglia, CEO

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Founded 2015 | 25 employees
Paula Pislaru, COO

DataDiggers helps businesses and organizations reach their maximum potential by facilitating access to thoughts and opinions of people around the world. We are market research experts who provide clients all over the globe with a full set of data collection solutions and supporting services to help their businesses grow. We own 65 proprietary panels in Europe, the Middle East, Africa, Asia and the Americas, and we can provide access to more than 818,000 active panel members. In terms of services, we've got: 24/7 coverage for sales and project management; highly qualified staff across three continents; free weekend coverage; flexible testing and launching hours; a hassle-free process from start to finish; no minimum fee and no setup charge; free questionnaire localization; high-quality programming; healthy panels; excellent support for mixed methodologies and more!

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Founded 1978 | 150 employees
Jerry W. Thomas, President and CEO

Decision Analyst offers an array of research and analytical consulting services worldwide to help its clients build winning business models. The firm melds qualitative research, secondary research, sophisticated survey research, advanced analytics, mathematical modeling and simulation to solve complex marketing and business problems. Decision Analyst operates in North America, Europe, Latin American and Asia. The firm specializes in strategy research, market segmentation, concept testing, package testing, in-home product testing, new product ideation, new product sales forecasting, pricing research and advertising research. Decision Analyst's strengths in statistics, modeling and optimization provide the foundation to address complex business and strategy issues.

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www.decisionanalyst.com

Herron Associates Inc.

Founded 1958 | 20-25 employees
Sue McAdams, CEO

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Founded 2006 | 50 employees
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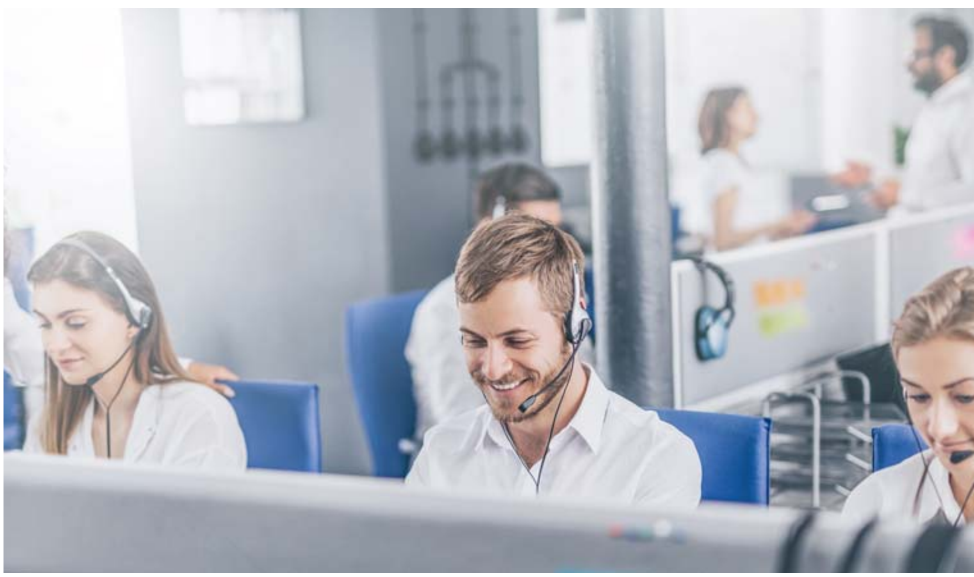

InnovateMR

Founded 2014 | 120 employees
Matt Dusig, Founder and Managing Director

InnovateMR's founders helped to usher in the modern digital sampling industry, creating the world-class uSamp and goZing panels. InnovateMR is a fiercely independent sampling and research tech company that delivers Faster Answers™ from business and consumer audiences utilizing technologies to support agile research. As industry pioneers, InnovateMR connects organizations with targeted audiences around the world and develops forward-thinking products to support informed, data-driven strategies and identify growth opportunities. InnovateMR's newly released Vision Suite™ offers researchers a comprehensive collection of next-generation products designed to execute all aspects of the research process including survey design, sample procurement, field management, fraud mitigation and reporting.

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Dr. David Lundahl, CEO and Founder

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Bruce Tincknell, Managing Director

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Founded 1986 | 51 employees
Michael Krämer, Managing Director
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Anthony Molinaro, Managing Partner

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Momentive, formerly SurveyMonkey (SVMK Inc.), is a leader in agile insights and experience management, delivering powerful, purpose-built solutions that blend our expertise with technology to deliver insights at radical speed. At Momentive, our AI-powered insights platform is built for the pace of modern business so you can deeply understand your market, elevate your brand and build winning products faster. Our solutions incorporate our AI engine, built-in expertise, sophisticated methodologies and our integrated global panel of over 144 million people to deliver meaningful quantitative insights in hours, not months. Momentive also has a team of market research consultants that can take on anything from research design to custom reporting as needed, so you can spend more time shaping what's next for your organization. To learn more, visit momentive.ai/insights.

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Founded 2004 | 41 employees
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Precision Research Inc.

Founded 1959 | 25-49 employees
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Precision has been recruiting and hosting for audience and sensory research at our Chicago facility for decades. Our largest room seats over 60 people. Our sensory room seats 30 people at a time. We also recruit nationally to partner facilities and hotels. We manage our proprietary panel of respondents using our best-in-class recruiting system to efficiently identify and schedule respondents. Our process delivers highly accurate recruiting quickly and affordably. Of course, we have all the tech you need: ultra-high-speed internet, HD video recording and streaming.

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Founded 2003 | 115 employees
Greg Matheson, Managing Partner
Joe Farrell, Managing Partner

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Founded 1985 | 300 employees
Robert Porter, CEO

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Founded 1966 | 1,200 employees
Matt Campion, CRO

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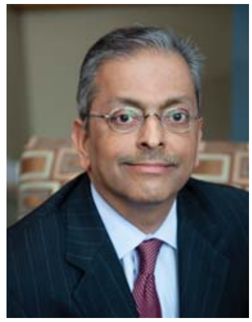
Shapiro+Raj

Founded 1955 | 80 employees
Zain Raj, CEO



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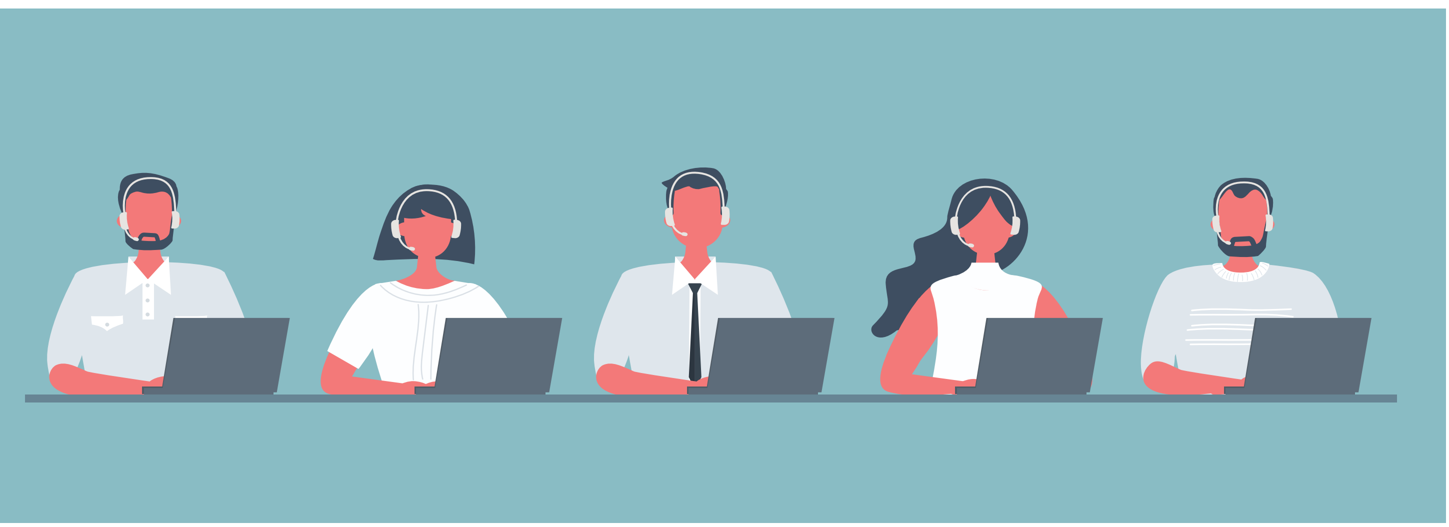

Symmetric, A Decision Analyst Company

Founded 2016 | 150+ employees
Jason Thomas, President

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Telepoll Market Research

Founded 1990 | 75 employees
Christine Schmakies, Director of Operations

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www.telepoll.net

Thematic

Founded 2017 | 15 employees
Dr. Alyona Medelyan, CEO

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Toluna

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Frédéric-Charles Petit, CEO

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www.tolunacorporate.com

Optimizing the CPG multipack portfolio

| By Erwin Chang

snapshot

Erwin Chang explores a technique for determining how many multipacks a company should offer and how they should be configured.

Multipacks have become an essential part of any CPG marketing plan. They have the potential to create customer loyalty and serve a segment of the population that tends to buy in large quantities. Moreover, in the U.S., sales of some consumer goods categories are based primarily on multipacks, such as toilet paper, tea bags, fresh eggs and alkaline batteries.

The right multipack set should create happier customers, boost sales, stimulate consumption and reduce production costs by limiting product cannibalization within multipacks. Optimizing the multipack portfolio is a win-win situation.

But there are two basic questions that brand managers, and even those higher up, struggle to answer when reviewing their product portfolio: Does my brand have the right number of multipacks? And, do my multipacks have the correct number of units per pack?

Thankfully, there is a statistical technique that is designed to tackle these questions: multisize product analysis for consumer goods (MPAC). This article will describe some key data from a study of multipack customers and explain in detail how MPAC can help brands conceive the ideal multipack portfolio. (MPAC is a proprietary research tool developed by me and owned by my firm, Bloommark, but all interested parties are encouraged to use it for their personal benefit at no cost. However, companies or individuals who wish to use the tool for commercial purposes must contact Bloommark for permission.)

Very appreciable

The population that tends to buy multipacks is very appreciable. In a recent study conducted on people who buy groceries at least once a month at brick-and-mortar stores, around 48% of interviewees mentioned that they buy multipacks during their grocery shopping trips. (This question may not consider occasional purchases and purchases at other sales points beyond grocery stores.)

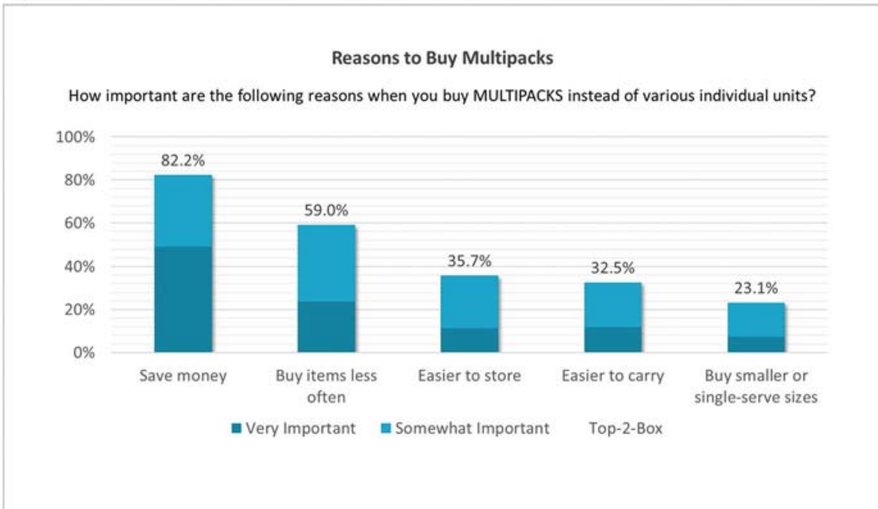
Price is the top driver behind the decision to buy multipacks. As seen in Figure 1, in a five-point scale question, 82% stated that saving money is either an "extremely important" or "very important" reason to buy multipacks. After price, the next most important factor that drove multipack purchases was customers' desire to "buy items less often." Almost six out of 10 interviewees considered this extremely or very important.

Less than half of respondents rated other reasons, such as "easier to carry" and "easier to store," as extremely important or very important.

Interestingly, the study also found that some food categories do not satisfy the multipack demand at grocery stores (excluding warehouse clubs, online retailers and convenience stores). For example, around 70% of multipack customers who buy canned beans or spaghetti have mentioned that they would definitely or probably purchase those products in multipack format if available at grocery stores.

Using statistical analysis as its foundation, the MPAC aims to provide CPG companies with the right multipack portfolio (the number of units per multipack and the number of different multipack sizes) to reach and satisfy the largest

Figure 1



customer base. The MPAC answers the questions about how many multipacks to include in a portfolio or set and which multipack sizes (number of units per multipack) to offer. Whether a company wants to launch multipacks for the first time, add multipacks, reduce the number of multipacks or just optimize the current portfolio, the MPAC is designed to provide the answer.

One of the main criteria to optimize the multipack sets is the reach that the set may have. Essentially, the reach is an estimate of the percentage of shoppers who would buy a multipack from a given set of multipacks. Other essential factors are also taken into account.

Unlike other approaches, the MPAC doesn't consider a predefined group of multipacks in terms of multipack sizes (e.g., a six-pack, a 12-pack, a 24-pack, etc.). Instead, it analyzes all possible multipack sizes that fall between the minimum number of units and the maximum number of units per multipack that survey respondents would like to have in a multipack (min/max range). This way, the MPAC evaluates thousands of multipack combinations for a specific set size to create a ranking of top performers.

For example, let's assume that after collecting all responses from an MPAC survey, the smallest multipack size that a respondent would like is a two-pack and the largest multipack size mentioned in the survey is a 48-pack. Also, let's say that the CPG company that requested the study only wants a set size of four multipacks.

Using a statistical model, the MPAC will measure the market potential of all possible combinations, which, in this case, equal 178,365 different sets (using the statistical formula for combinations C(47,4)). For instance, it will calculate the market potential for Set 1: a two-pack, a three-pack, a four-pack and a five-pack; then, for Set 2: a two-pack, a three-pack, a four-pack and a six-pack; and so on. Of course, the list handed to the CPG company would only include the top sets. (Note: Please do not attempt to calculate the market potential of each possible combination manually!)

In addition, the MPAC will use the same principles to analyze different set sizes. Usually, it is the CPG company that gives the range of sets. For example, a company may specify that it would like to study sets that range from two multipacks to six multipacks.

Furthermore, although this study focuses exclusively on multipack portfolio optimization, the MPAC technique has various applications. One such application involves optimizing multisize unit portfolios, taking into consideration unique variables like individual unit size and packaging. For example, it can show that the best multisize unit portfolio for a beverage comprises a 10-ounce can, a 16-ounce can and a 34-ounce plastic bottle. Thus, the MPAC technique can be useful for CPG companies' wide-ranging needs.

Survey design

Although the MPAC survey has a well-delineated structure, some adjustments are necessary depending on strategic goals. Some common examples of study objectives include: increase consumption from current brand customers, reduce production costs by reducing the number of multipacks and increase market share by offering unique multipacks, among others. Thus, three main survey design variables should be defined according to the main brand goal(s) for the study: respondent target, point-of-purchase segments and purchase purpose.

The respondent or survey target of an MPAC study is determined by consumption patterns. The two most common targets are the brand shoppers and the category shoppers. Large brands, with large penetration levels, usually focus on their own shopper base, as the current repeat shoppers are very valuable, have been gained with much effort and can still provide more growth.

On the other hand, smaller brands, in terms of reach, focus on the category customer for two reasons. One is that small brands prioritize gaining new customers and increasing their market share. Thus, the data that they need for their growth goals is the product category information. The second reason is that it is difficult to recruit shoppers of a brand with a small market presence.

Besides these two standard marketing research targets, other less common target options obey particular brand strategies for multipack R&D.

Since different retail channels attract customers with different needs, the items that brands offer may differ from channel to channel. Accordingly, the multipacks available at one type of retail can vary significantly from those found on another channel. For instance, the multipacks at Costco would most likely have more items or larger unit sizes than the ones available at Whole Foods (e.g., a 16-ounce package instead of an 8-ounce package).

Figure 2

Net Reach Maximization Analysis (set of 6 Multipacks)

Ranking	Multipacks Sizes						Net Reach	Ideal %	BC
	1st MP	2nd	3rd	4th	5th	6th			
1	2-pack	4	6	12	24	36	96.2%	65.6%	-0.076
2	4	6	12	24	36	80	96.2%	64.4%	-0.056
3	4	6	12	24	36	75	96.2%	63.8%	-0.060
4	4	6	12	24	36	96	96.2%	63.8%	-0.063
5	4	6	12	24	36	90	96.2%	63.5%	-0.050
6	4	6	12	24	36	88	96.2%	63.5%	-0.052
7	4	6	12	24	36	84	96.2%	63.5%	-0.055
8	4	6	12	24	36	78	96.2%	63.5%	-0.057
9	4	6	12	24	36	76	96.2%	63.5%	-0.059
10	2	4	6	12	20	36	96.2%	49.8%	-0.119
11	4	6	12	20	36	80	96.2%	48.6%	-0.099
12	4	6	12	20	36	75	96.2%	47.9%	-0.102

Thus, it is important to take into consideration the different points of sale. For instance, for food and beverage products, there are five main retail channels that have unique characteristics: warehouse clubs, such as Costco; mass merchandisers, such as Walmart; grocery stores (which can be split into traditional and natural stores); convenience stores; and online stores. Nonetheless, it is possible to expand (add drugstores or dollar stores) or reduce (merge mass merchandisers with grocery stores) the list according to the product category and research design.

The third variable involves defining and indicating the purpose of the purchase, if necessary. Shoppers may buy different multipack sizes if they are buying for their own consumption or for a party, for instance.

In any case, the MPAC survey must be administered to either current multipack buyers or likely multipack buyers or a combination of both. A single screener question, such as purchase intent for the product multipack, can filter eligible participants.

The MPAC questions for multipacks

The MPAC asks three questions that are the pillar of the analysis:

- If you were to purchase multipacks of [CATEGORY and/or BRAND] at [STORE TYPE if applicable], what is the IDEAL number of [UNIT TYPE/PRESENTATION (e.g., 3-ounce glass bottle)] that you would like the multipacks to contain?
- If you were to purchase multipacks of [CATEGORY and/or BRAND] at [STORE TYPE if applicable], what is the MINIMUM number of [UNIT TYPE/PRESENTATION] that you would like the multipacks to contain?
- If you were to purchase multipacks of [CATEGORY and/or BRAND] at [STORE TYPE if applicable], what is the MAXIMUM number of [UNIT TYPE/PRESENTATION] that you would like the multipacks to contain?

If necessary, the questions may also include a purchase purpose specification (e.g., "If you were to purchase multipacks of beer at a gas station for a party…"), as explained in the previous section.

The three questions are very important, as it is not only crucial to know the shoppers' minimum and maximum multipack size range (min/max range) but also which exact size is his/her favorite. The importance of knowing the ideal multipack size will be explained in greater detail in a subsequent section.

Also, these questions are suitable for any type of data collection method, including CATI, online questionnaires and PAPI, without the need to modify them.

Notice that the questions do not use a purchase intent condition connected to the number of units asked but rather a liking one (for example, ending the question with "that a multipack should have for you to buy it" rather than "that you would like the multipacks to contain").

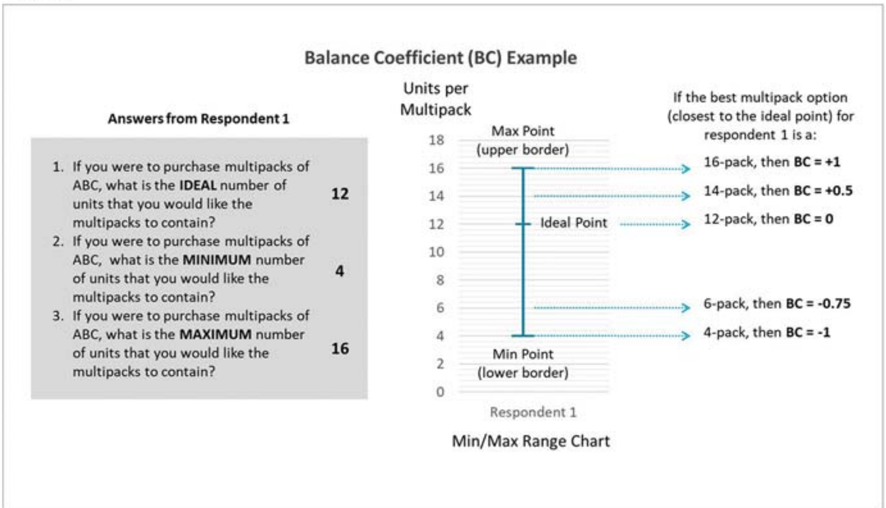
Our research suggests that including the purchase intent condition leads respondents to provide a wider range of size options (defined as the min/max range) as opposed to just asking for what they "would like" the multipack to have. In fact, using a purchase intent condition may provide options that are unreal, as the shopper may be willing to buy some of the multipacks only under extreme situations (such as when there is no other choice in the store, for example).

The three MPAC questions should be administered using the following recommendations. The first one is to avoid using multiple-choice alternatives and instead require the respondent to write (or say) the answers. Multiple-choice questions work well when the number of multipack sizes (options) is not very large. However, they aren't as effective when the options are more substantial. Moreover, using the multiple-choice alternatives leads respondents to use a specific range and may also hide potential multipack sizes that are not in the options. Additionally, if answering the survey online, writing the numbers will force respondents to read the questions and respond more thoughtfully, instead of randomly selecting any option.

If conducting online surveys, it is recommended not to combine the MPAC questions with other questions on the same page. As well, it is also advisable to apply validation options, such as allowing only positive integers as answers and verifying that the minimum number of units is equal to or lesser than the maximum.

The last recommendation is to carefully clean the data if there are no validation options in place. Some respondents will write a minimum number of units that is higher than the maximum number or write an ideal number that is outside the min/max range.

Figure 3



Analysis

In this account, the analysis and KPIs will be described using real data obtained in one of our studies for the toilet paper category. When processing and cleaning the data, only multipack sizes that could be accommodated in a convenient cuboid shape were taken into account. For example, multipack sizes such as 62-roll multipacks were discarded (the only way to accommodate 62 rolls in a cuboid shape is in a 2x31-roll multipack package, which will be very inconvenient for shoppers to carry). Other categories, such as the chocolate candy category, do not present this type of problem because its boxes or plastic bags can accommodate any (reasonable) number of candies.

Once the survey data is collected and processed, the MPAC technique provides two main types of analysis: the net-reach maximization and the portfolio-size optimization.

The net-reach maximization (see Figure 2) refers to analyzing multipack combinations for a specific set size. This is the most important analysis when companies try to define the multipack sizes that their portfolio must have. The analysis table provides a ranking with the top multipack combinations and their KPIs – net reach, ideal-size reach and coefficient of balance. These KPIs are described in more detail below.

The net reach is defined as the total penetration measured for a set of multipacks that excludes duplicate counts. For instance, a net reach of 33% means that one-third of the shoppers studied would find at least one multipack, in a given set, containing the number of units they would like a multipack to have.

The net reach is calculated using what is called the min/max range of each respondent. The min/max range is, in turn, based on the answers to the second and third MPAC questions regarding the minimum and maximum numbers of units that the shoppers would like a multipack to have.

The net reach indicator is one of brand managers' main priorities. It is usually the first indicator reviewed, as satisfying the multipack needs of a larger group means more sales and more market share. Moreover, the net reach is the primary factor used to sort the sets for the net-reach maximization analysis.

The ideal-size reach (ideal % or ISR) is in the penultimate column of the net reach maximization table. It represents the percentage of customers who declared that their ideal number of units for a multipack is provided by one multipack of a given set. For example, if the ideal-size reach is 50% for a multipack portfolio, it means that half of the shoppers found their ideal multipack size among the multipacks of that set.

The ideal-size reach indicator (before the last column) is the second KPI used to sort the net-reach maximization analysis ranking. It is crucial for the analysis if the net reach estimates are the same or quite close among sets. For example, as you can observe in Figure 2, it is not uncommon to find various multipack sets with the same net reach for a given set size (in this case, six multipacks per set). This phenomenon happens when analyzing medium or large sets (with five or more multipacks, for example) and the product category comprises a wide range of single multipack alternatives (toilet paper multipacks vary from two rolls to 80 and more!).

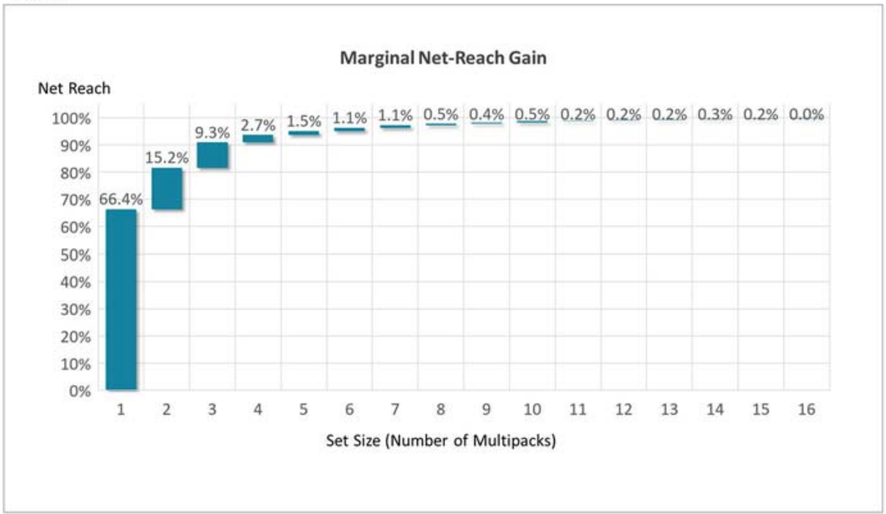
The ideal-size reach is important for at least two reasons. First of all, a higher ISR produces a higher satisfaction level when comparing two sets with the same net reach, according to various products studied. For instance, speaking about a related product category, 98% of paper towel shoppers mentioned that they were either very satisfied or somewhat satisfied (top two-box) when buying a paper towel multipack that contained their ideal number of rolls. On the other hand, only 78% said they were at least somewhat satisfied when buying a paper towel multipack containing the minimum number of rolls they would like a multipack to have.

A common pattern shared in many product categories is that the satisfaction ratings related to buying a multipack that has the maximum number of units that a shopper would like are usually higher than the satisfaction ratings for the minimum size but, of course, lower than the satisfaction ratings for the ideal size.

More importantly, a higher ideal-size reach also means more sales. This is true after conducting purchase intent and scenario-based (vs. competition) multiple-choice inquiries that compare multipacks that fall into their min/max range but do not necessarily have the respondent's ideal number of units. It means that some shoppers will prioritize their ideal multipack size over their favorite brand in many cases.

Nonetheless, the ideal-size reach varies in importance depending on

Figure 4



the product loyalty level. According to our product loyalty ranking, the purchase intent of products with the lowest loyalty ratings is very susceptible to changes in the ideal-size reach estimates and vice versa. On the one hand, some product categories, such as bottled water, which has a low product loyalty (due to low-cost private-label brands), show that shoppers are willing to switch brands based on the multipack size.

On the other hand, the pattern of switching brands in order to buy the preferred multipack size is virtually nonexistent in some other categories, such as the deodorant category, which enjoys the highest product loyalty rating of over 30 categories tracked.

The last indicator for the net-reach maximization analysis is the balance coefficient (BC) (last column in Figure 2). This is the third factor used to sort the net-reach maximization analysis. It is a way to analyze the shopper distribution among the minimum and the maximum number of units that he/she would like a multipack to have. It helps to indicate how well-balanced the set is according to shopper preferences. The BC is a number between -1 and 1. It is the average of all potential shoppers' BCs.

The main three cardinal points are -1, 0 and 1; -1 means that the number of units of a multipack equals the minimum number of units that a shopper would like to have in a multipack. Likewise, 1 means that the number of units in a multipack is at the upper border. And 0 means that the number of units obtained by the MPAC equals the ideal number of units that a customer would like in his/her multipack.

The numbers within -1 and 0, or within 0 and 1, are computed using a linear equation. For instance, a BC of -0.5 means that the number of units of the evaluated multipack falls exactly between the minimum number of units that a customer would like to have in a multipack and his/her ideal point. The calculation only takes one side of the distribution at a time because the BC distribution tends to be asymmetrical.

When analyzing sets, one goal is to have a BC equal or closer to 0, which means that it is well-balanced and may present a high ideal-size reach. However, it is also important that the distribution leans toward the right or upper border (a BC over 0). This is because of two reasons.

One reason is that it is preferred that the customer buys a little bit more than his/her ideal quantity versus a little bit less. Having more product units at home means that they are less likely to run out of the product and, in many cases, it incentivizes a higher consumption level. The other reason is that the multipacks with more units than the ideal number but within the min/max range tend to provide higher satisfaction and purchase intent ratings than the multipacks with fewer units than the ideal point.

See Figure 3 to see an example of how the balance coefficient is calculated.

The second analysis is the set-size optimization. It is the most important analysis when a brand wants to know if it should increase, decrease or maintain the current number of multipacks. Unlike the previous analysis, this one does not exhibit a ranking but rather a list sorted by the portfolio/set size. For example, the list can start with a set of two multipacks and finish with a set of six multipacks.

The set-size optimization shows only one multipack combination per set or portfolio size. The multipack combination presented is the top one obtained in the net-reach maximization analysis.

Furthermore, the set-size optimization can also be analyzed using two derived indicators. One is the marginal net-reach gain and the other is the marginal ideal-size-reach gain. The marginal net-reach gain reports the percentage of net reach gained when the number of multipacks of a set increases by one unit. In Figure 4, the marginal net-reach gain is presented using a waterfall chart.

Accordingly, the marginal ideal-size-reach gain presents the percentage of ideal-size reach gained when the number of multipacks of a set increases by one unit. This indicator becomes very important when brands focus not only on increasing the net reach but also the ideal-size reach.

Still not enough

Having the right multipack portfolio is a big step for a brand but still not enough for a successful story. Pricing (remember, it is the most important reason to buy multipacks!), distribution and multipack package design are part of the final steps. Other factors, such as manufacturing capabilities, may play a role in the success of multipacks as well.

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••• qualitative research

Close from a distance

Leifheit turned to digital qualitative research when in-person wasn't an option

| By Barbara von Corvin, Johannes Pirzer and Thomas Diehl

snapshot

The German household products maker used digital ethnographies to help generate new product ideas during COVID-19.

How well do digital ethnographies work – and how do they compare with our pre-pandemic experiences with face-to-face in-homes? This is the question that many research agencies and clients across the globe have been forced to address over the past 12-18 months as proven face-to-face or in-person approaches have been sidelined by the pandemic.

In this case study from fieldwork executed during the pandemic in 2020, research company Happy Thinking People and German multinational household products manufacturer Leifheit will document how a two-stage online ethnographic approach worked extremely well, even exceeding client-side expectations. We share the methodological approach, key learnings, benefits and suggest a number of watch-outs.

Digital ethnography is, we conclude, a suitable candidate for the new normal in qualitative research and offers an expanded digital tool that can deliver in-depth insights from a distance.

Notable digital expansion

While qual was originally slow to transform itself fully digitally, the pace of recent change has been remarkable. Digital is certainly not new for qualitative research – online communities (MROCs) have been mainstream for at least 10 years in many geographies and mobile ethnographies have been broadly adopted since the early 2010s – but there has been a notable digital expansion and acceleration over the past 12 months, spurred on by the pandemic.

A number of qual methods have been positively impacted. Online depth interviews and mini-online groups have gained global acceptance as positive experiences have dispelled doubts over issues of depth of insight, reliability and consistency of results.

Ethnographies – or in-homes – were traditionally seen as only possible face-to-face. Lasting over many hours in users' homes, they delivered authentic glimpses into participants' real lives, rich in emotional subtlety

and naturally occurring, contextual insights. They are well established as the go-to method for new product development projects to help reveal white spaces at the front end of the innovation process.

A potential switch to digital in-homes raised fundamental questions:

- Were sensitive depth and true empathy possible from a distance?
- Could online deliver equally inspiring and granular insights as face-to-face or was the absence of physical proximity a deal-breaker?

Simplify daily life

Leifheit's slogan "How housework's done today" summarizes the company mission to simplify everyone's daily life through the development of modern, innovative and convenient household products.

Its focus for the current study was to identify relevant consumer insights and needs to inspire the ideation of breakthrough solutions with huge consumer relevance and high satisfaction potential. In addition, Leifheit wanted to use trends as a springboard to ensure a high resonance with various target audiences. One of these trends was the aging society.

The study was originally planned for spring 2020. COVID was peaking and all of Europe went into lockdown. Face-to-face was out of the question, so a new digital approach was necessary – with the following key challenges:

- How can we best replicate the sense of closeness using online tools and operating from a distance? How can we best attune the setup and moderation approach?
- How can we fully capture the context, the in-home situation, when researchers are not physically present and able to explore and investigate?
- What about non-verbal information – often small, potentially subtle but revealing pieces of information that an in-home ethno invariably throws up? Would vital clues get lost?
- The same question for unmet or unarticulated needs. Observers in situ can arguably see more broadly whereas digital offers a potentially narrower, selective angle.
- How can we ensure the full involvement of participants aged 60+? This was especially critical given the importance of the growing segment of internet users over age 55 (aka Silver Surfers).

In retrospect, we think these concerns were perhaps exaggerated. They are assumptions based on an idealized or even romanticized view of traditional ethnographies: that only face-to-face can allow researchers to fully read between the lines or adequately surface submerged emotions. While accessing nuanced sentiments and anchoring them in a relevant context is probably more difficult online – and requires a different setup and research approach – it's certainly not impossible!

Complement one another

Our design approach was driven by the need to deliver deep dives that were broader and more category-relevant while also specific. It seemed to us that a multistage approach would work best to deliver on both objectives. Our hypothesis: A mixture of online communities and screen-to-screen depths could complement one another well.

We knew from experience that MROCs are powerful tools that use an asynchronous and longitudinal approach over days (and sometimes longer) to give researchers a solid understanding of how a brand or product category is used in real life. They deliver a rich mixture of responses and response types, from quick polls to videos, picture uploads, picture sorts and more. Combining this array of outputs with targeted in-depth explorations seemed a good option.

We had worked extensively since the onset of the pandemic on how best to access digital depth and learn the new skills and approaches for qual researchers. For the Leifheit project we used the following two-step, 100% digital design:

Phase 1: 10-day online insight community with 36 participants overall, divided into three subgroups.

Phase 2: 12 screen-to-screen interviews, one hour each, for in-depth subsequent explorations.

In the online insight community, the subgroups were allocated appropriate cleaning tasks and asked to keep a multimedia cleaning diary. They uploaded pictures and short videos, commenting on them. To keep interest high and stimulate discussion, participants within the subgroups saw each other's posts and shared thoughts.

Allowing participants to post in their own time and over the space of 10 days delivered a huge array of material and insights that compares positively to that generated by a half-day face-to-face in-home session.

We also observed a higher level of sharing of more personal, even intimate details than our long experience with in-homes usually generated. The absence of a physical moderator in-home perhaps played a disinhibiting role here.

Overall, we gained a nuanced understanding of our participants as individuals and the varying facets of their personalities, thanks to the range of contributions to different aspects over the duration of the research. This in-depth knowledge helped inform a selection of participants for the ensuing deep-dives.

The screen-to-screen depth sessions involved selected participants (a subsegment of the online community) using their smartphones and taking us on a real-time video tour of their homes, taking/uploading the output enriched with accompanying still photos.

Each tour involved a focus on a particular area and type of activity, with participants talking us through their needs and challenges for each. Effectively, it felt like we were there in person. We asked people to go to a particular room or area, show us something more closely or help us understand something they had shown in more detail.

This part of the research was key to getting to the motivational drivers – what was really important to them, in their own words and why. The mixture of tasks and targeted research dialogues was a powerful mix of behavioral and attitudinal aspects.

Sharing seemingly everyday problems such as cleaning the house was perceived as entertaining and – especially during the difficulties of the global pandemic – a welcome distraction, with a high sense of community.

Delivered on all the areas

Digital truly allowed depth from a distance. Despite the restrictions on sensorial involvement – smell and touch for example – the 100% digital approach delivered on all the insight areas required for the new product development team.

Participants were clearly comfortable with the setup (no "strange observers" in their home) and arguably this fostered an even more natural setting. The longitudinal aspect also allowed participants to relax and do things in their own time, which must enhance the authenticity of the output.

The sense of emotional bonding definitely worked digitally, despite the concept of researchers and participants linking up in a temporary virtual space. As researchers, we felt like we were with our participants in their homes; in fact, the distance of half a meter from our computer screen wasn't any distance at all.

In this study, we strongly felt that the digital approach would fare well in an academic equivalence approach compared to face-to-face. The range of insights, the depth and granularity were all outstanding.

In summary, we would suggest that the multiphase digital approach delivered the following advantages: high engagement and involvement levels; easier, more comfortable for participants; superior time and cost efficiency; broader geographic spread of participants; and better eco-footprint (no travel).

Can run smoothly

The above assumes that the user experience for participants is seamless and free of problems. The software has to be easy to understand and use for all age groups and tech-affinity levels, so that both video interviews and overall interaction between community participants can run smoothly.

Basic aspects need to be double-checked. For example: participants being at home during the interviews; log-ins from a mobile device rather than a PC; Wi-Fi being available throughout the whole home.

However much technical confidence researchers may have gained, not all participants have the same familiarity and comfort level with the various technical requirements, making tech support essential to help handle unforeseen glitches.

Project managers also have to take particular care with digital data ownership/intellectual property issues and data protection and privacy requirements. These can be different – and in some cases stricter – with 100% digital market research projects. Usage rights and copyright reside with the participants (the content generators), which has implications for any subsequent usage of the material generated. Researchers need to plan accordingly.

Digital can deliver

Our fully online case study with Leifheit demonstrated that when executed in the right way, digital ethnographies can deliver just as well as (and in some cases better than) their face-to-face counterparts.

The study confirmed that digital ethnographies offer closeness from a distance, yielding range, depth and density of insights. Digital closeness does however require a different approach from researchers.

While it's premature to talk of validation, the study suggests that digital ethnographies can be added to the qualitative toolkit and be regarded as part of the new normal in qualitative research.

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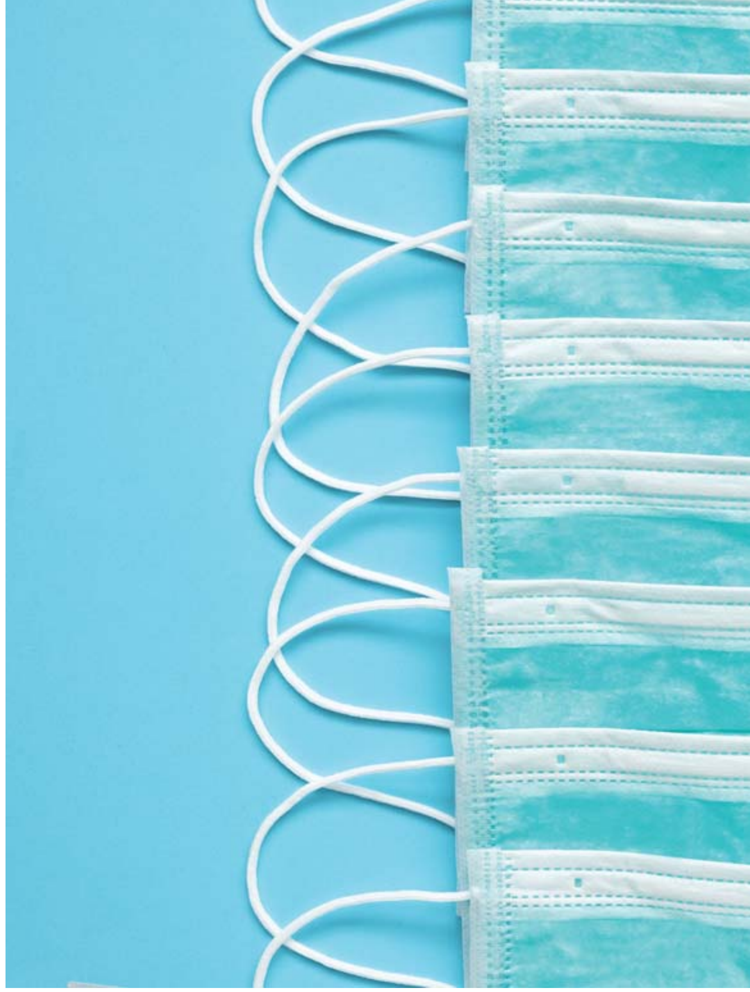
••• multicultural research

One size doesn't fit all – part II



The rise of cultural empathy and its implications for marketing research and marketing

| By Roben Allong, Iris Yim and Patricia Lopez

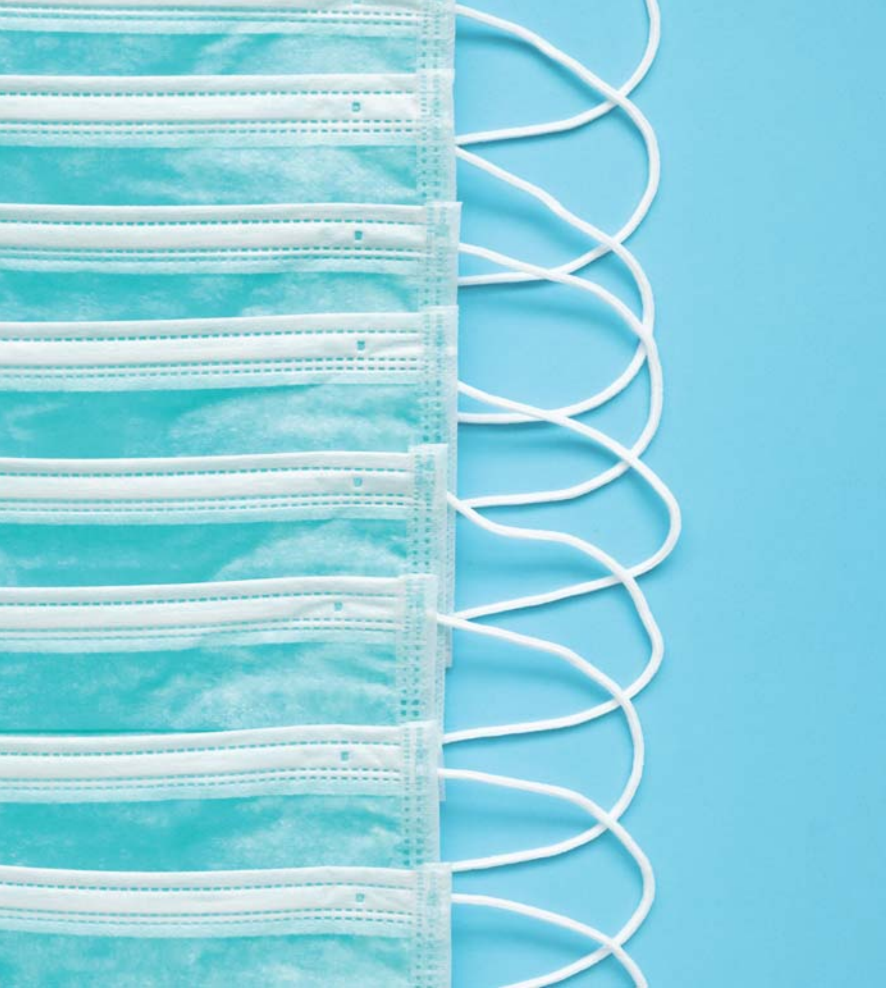
snapshot

The authors follow up on their July/August 2020 article ("One size fits all") to further chart the impact of the pandemic on Black, Asian and Hispanic consumers.

The disproportionate impact of COVID-19 on communities of color has exposed and highlighted inequities as well as accelerated the decline of BIPOC trust, especially in heritage brands, government, the justice and health care systems and society at large. For brands, in today's world – one rife with rising hate crimes, systemic racism and discrimination, instability and economic hardship – expressing empathy is, at minimum, table stakes. BIPOCs, especially Gen Z, are demanding more authentic engagement and active participation in their communities from the corporations and brands that sell to them and use their labor, as is evidenced by corporate giants Delta and Coca-Cola's position reversal on the Georgia Election Integrity Act of 2021. Increasingly informed and digitally savvy, their voices carry much farther and louder locally and globally, compared to prior generations. Therefore, it would behoove researchers and marketers alike to take a culturally empathetic look at these shifts and the reasons underlying them to glean a more accurate picture of what's going on.

So what is cultural empathy, why is it important now and how does it help researchers and marketers? Cultural empathy is next-level understanding that is grounded in generational, cultural and contextual knowledge of microcultures. Microcultures are those that exist within the dominant culture. They are often marginalized but pack an outsized influence punch when they come together over a singular cause.

Two prime examples are hip-hop music and the Black Lives Matter movement, both of which sprung from disadvantaged, ignored communities with unmet needs. They influence and set the tone for brands and generations of consumers the world over. According to marketer Brandon Graille, hip-hop is beloved globally, drawing the spending power of over $500 billion from the coveted age 18-34 age group. The Black Lives Matter movement has impacted American and the world's culture and social fabric in ways we haven't even begun to decipher. At its core, cultural empathy is a superpower that helps us make sense of our own narratives through



the lens of culture, validate lived experiences as authentic truth and put inclusivity into practice simultaneously.

Heading into a post-pandemic world, the average consumer is clearly at a crossroads. Using cultural empathy, researchers and marketers can have a more accurate sense of how to incorporate these emerging voices, narratives and needs in a way that is inclusive and promotes proactive exploration of opportunity gaps. Given the seismic consumer shifts brought on by this pandemic, rapidly evolving demography, increasing social media usage and ongoing social movements (#MeToo, #BLM, #CancelCulture, #StopAsianHate, among others), the need to move the business needle from reactive to proactive among microcultural audiences for a bigger, sustainable competitive advantage is only going to increase.

Black/African American

Among Black Americans specifically, COVID-19 has become the third leading cause of death, based on a recent report by the Brookings Institute. According to the data tracker from the Centers for Disease Control (CDC), the five underlying comorbidities that increase the risk for severe COVID-19-associated illness include chronic kidney disease, chronic obstructive pulmonary disease (COPD), heart disease, diagnosed diabetes and obesity. Black Americans over-index in three of those five.

During the Spanish flu pandemic, racism and segregation in America restricted Black access to health professionals and health care. More than a century later, access is still limited regardless of geography and many are dying at faster rates than other races as they struggle to get past systemic racism and generational mistrust of government and the medical profession. So it's no surprise that vaccination rates among this population are lagging.

COVID-19 has sparked not just a racial reckoning but a brand reckoning of sorts. No longer is it OK to deploy messages about Black advocacy without having had a historical footprint. Pre-COVID-19, many brands were already out of touch with this demographic – one that possesses tremendous social and cultural currency – because they only did just enough research to check the box. This created a lack of accurate Black consumer marketing intelligence, which has left heritage and popular brands wondering how to reach and retain this influential audience.

Black people and their identity are not a monolith. They never were. According to a recent Pew Research Center study (The Growing Diversity of Black America) as the Black population grows and intermarries, so it diversifies – as does the Black identity. What, then, are culturally appropriate, effective ways to empathize and connect so that brand intent aligns with impact?

The answer is complicated. The Black identity is not only diverse but many other ethnicities relate to and are influenced by it. Its cultural signs, codes and symbols are appropriated the world over. For example, hip-hop music and symbolism are used relentlessly by brands in advertising to showcase their "cool" factor.

For researchers and marketers, cultural empathy – a deeper understanding of a Black culture that has, at its roots, a lack of trust in systems that have both oppressed and failed them consistently – is essential. It is critical to understanding the generational trauma that is part of the Black consumer DNA. Simply creating brand communications with acknowledgement of discrimination, racism and recent social justice protests is not sufficient to overcome centuries of Blacks being erased out of or passed over in history.

Quite frankly, it's disingenuous to think that token efforts such as Blackout Tuesday on Instagram hit the mark. For Black Gen Z especially, it is no longer acceptable for corporations to idly stand by and watch while their customers suffer inequality and indignity. Brands are expected to take a stand regardless of potential outcome. And they are also expected to be proactively supportive and present in their customers' communities.

So, ultimately, what does this mean for brands and how do they go about applying cultural empathy to win over Black customers and other demographic segments that identify with the culture?

Implications

The real long-term impact of a hijacked economy, societal inequity and mental and emotional trauma (especially on Black Millennials and Black Gen Z, who remain unapologetic on their social media megaphones) has yet to unfold. The advent of a national cultural awakening will undoubtedly remake the way we look at not only Black consumers and race but the demographics influenced by them globally.

Interestingly, a Pew Research Center study stated that as of 2019, most multiracial Black people are members of Gen Z. The spending power of Gen Z is estimated at $143 billion and 46%, nearly half, are part of the gig economy, in pursuit of expanding their earning potential, according to The Shelf, an influencer marketing agency.

To engage Black people and especially Black Gen Z is to envision a future with them seated prominently at the table, as advocates – digital warriors empowered with technology to change their society in ways that reflect their ideals and not necessarily those fed to them by brands. Black Gen Z, unlike past generations of Black Americans, are inspired by seeing social protests in real time, curated peer creativity through apps like TikTok and possibilities for self-expression without filters and they are looking directly to their culture and its allies to help shape that future. Brands that help them envision the path forward will reap the rewards of new followers, more brand love and loyal customers. Here are four ways researchers and marketers can strengthen their engagement with Black consumers:

First, cultural empathy will be the magic "open sesame" passcode needed to unlock the treasure chest that is the Black identity and mind-set. Researchers especially will need to be versed in historical and contextual perspectives prior to designing and successfully conducting studies. Meeting this consumer where they are mentally and emotionally post-COVID-19 by understanding their journey is key to meaningful engagement. By ensuring transparency when engaging them in research, you'll activate respondents' willingness to share, which can yield dividends in their sharing of more insightful feelings and thoughts.

Second, when designing the study discussion guide, consider their hypersensitive, traumatized mind-set, one that has been activated by current social and economic events. Weaving in relevant mental health inquiries and validations at the start and throughout the engagement can build rapport and help relieve stress while lowering barriers to open sharing. In addition, positive sharing promotes feelings of relaxation and freedom and encourages storytelling, so use it to convey validation and permission for them to be authentic and real.

Third, increase meaningful connection by providing safe spaces during the research that are empowering and nonjudgmental, even if you're conducting virtual research. Safe spaces are those that allow for freedom of individual expression and unfettered emotion without filters. Build in more discussion opportunities to allow for this. It's an emotional time for everyone and it's OK to acknowledge that. Acknowledgement is a form of validation that suggests "I see you," a phrase often used in Black lexicon that signifies conscious awareness and cultural empathy.

Fourth, in-house DIY insights teams may not be as skilled or effective as brands need them to be in this instance. A consultant versed in using cultural empathy is comparable to a sonar technician on a submarine, helping your brand seek out new areas of growth and innovation while safely navigating rocky, uncharted waters. They can help you avoid offensive messaging and incorporate relevant symbols and codes that match intent with impact.

Asian American

The escalated violence against Asian Americans in recent months and the Atlanta shootings accelerated the Stop Asian Hate movement, one that had been going on for a year since the beginning of the pandemic but was overshadowed by news of the pandemic and other events such as the Black Lives Matter movement. The pressing need to denounce violence against Asian Americans, influence of Black Lives Matter movement and the jolt from the Atlanta shootings served to unite a very diverse and often divided community under one umbrella to work toward a common cause: to rethink the Asian American identity and racial relations.

What sets the Asian American experience during the pandemic apart from other Americans is a shift in mentality – an increasing fear for personal safety coupled with health and financial security concerns. According to a report released by Stop AAPI crime, between March 19 and August 5, 2020, the organization received 2,583 reports of anti-Asian discrimination nationwide. The majority of the incidents were verbal harassment; 22% were instances of shunning and 9% were actual physical attacks. According to a Pew Research survey released in July 2020, one in four U.S. adults reported it had become more common for people to express racist views towards Asian Americans since the pandemic began and one in three Asian Americans said they had experienced verbal harassment due to their ethnicity during the pandemic.

This overall hostility towards Asian Americans has exacted a heavy emotional toll. According to a study conducted by multicultural advertising agency Intertrend in March 2020, four out of five Asian Americans reported being worried about racial bias, although only one in five respondents said they had had a negative experience of shunning.

Aside from the economic and emotional toll from the pandemic, what is most notable about the Asian American experience is perhaps this cultural shift in mind-set. Contrary to their cultural upbringing, one that revolves around perseverance and silent endurance, the confluence of the pandemic, hostility and the Black Lives Matter movement inspired many Asian Americans to speak up about their experience and rethink their relationships with other communities.

The AAPI advertising and marketing community has been very vocal about raising awareness and denouncing discrimination against Asian Americans. During the height of the pandemic in 2020, multicultural advertising agencies IW Group, Intertrend and Admerasia rolled out campaigns to address racial bias against Asian Americans (Wash the Hate, Make Noise Today, Racism is Contagious) in the absence of brand support. The industry organization Asian American Advertising Federation hosted town hall discussions on the issue in partnership with the Association of National Advertisers Educational Foundation. There have also been grassroots efforts led by different community organizations in response to racism and hate crimes against Asian Americans such as Respond2Racism and Stop AAPI Hate.

A year into the pandemic, there are encouraging signs that the community's continuous efforts in denouncing discrimination against Asian Americans finally gained traction in the mainstream. Outlets such as Ad Age and the Alliance for Inclusive and Multicultural Marketing have shown support for the AAPI community by hosting events. Some brands have also shown support with social media posts and donations to non-profit organizations for AAPI causes. The Atlanta shootings greatly accelerated and broadened the scope of the #StopAsianHate movement.

And it's not only organizations that traditionally support the AAPI community that are taking action. Asian American employees in corporations and general-market agencies are stepping up, most notably Horizon Media's multichannel PSA campaign against Asian hate, an initiative launched by an internal business resource group representing employees of AAPI heritage. There has also been more pressure for brands to respond to the issue.

In addition to grassroots efforts to speak about their experiences and denounce racial bias and hate crimes, there is also reflection about the Asian American identity and relationships with other communities of color, with realization that the "model minority" myth is part of the systematic racism that keeps other communities of color down. Within-group bias against African Americans also needs to be addressed. As part of the awakening and reflection, there is the demonstration of solidarity with African Americans and participation in the Black Lives Matter movement. Initiatives such as the All of Us movement and Asians for Black Lives from the Asian American Advocacy Fund seek to create mutual understanding of the Black and Asian communities and forge allyship.

Implications

While the complexity of the segment may seem daunting at first glance, there are overall cultural values and synergies between the subsegments that can be leveraged to broaden the reach and connection of your campaign. COVID-19 has rewritten the rules and, consequently, more consideration must be given to communicating and engaging with and marketing to this segment. In spite of the pandemic's negative impacts, Asian Americans remain a powerful economic force. The aforementioned awakening and increasing representation in mainstream culture such as Chloe Zhao winning the Academy Award for best director and Eddie Huang's new film "Boogie" require more thoughtful marketing strategies and communications. Here are four ways in which marketers and researchers can better connect with Asian consumers:

First, in the post-COVID-19 era, where diversity takes on new meaning and business implications, marketers need to rethink inclusion and representation of Asian American consumers in their campaigns. True understanding of the segment with cultural empathy and accurate representation of the multiple dimensions of the Asian American experience in marketing punctuates a brand's multicultural and diversity, equity and inclusion (DEI) efforts and can be amplified to have broad, general-market appeal. Further, the brand loyalty earned among Asian American consumers will have a significant impact on the bottom line in the post-COVID-19 era when consumers expect brands to take a stand on social issues such as DEI and anti-Asian hate crimes.

Second, it's important to not only include Asian Americans in your research for representation but also to boost the sample size so that there is a readable base for comparison against other segments as well as the total sample. Given that two-thirds of Asian Americans are foreign-born, it's also advisable to include an in-language component in your research design so that the research can more accurately reflect Asian American demographics.

Third, including consultants who have expertise in the Asian American segment can help insights teams and marketers incorporate cultural empathy to read between the lines and translate cultural nuances and insights. Advertising agencies that specialize in Asian American marketing can create different versions of the same campaign to cover different subsegments of the Asian diaspora.

Fourth, industry associations such as the Asian American Advertising Federation provide secondary research and educational webinars to help fill in the knowledge gap if access to budgets for primary research is not available.

Hispanic

According to numbers reported by Univision, over 14 million Hispanics voted in the 2020 election – record-breaking numbers! It was important to have their voices heard – perhaps in desperation, their last plea for hope and change. Not only were Hispanics dealing with the intensity of the political climate in areas such as immigration, higher education and opportunities for undocumented college students, they were among the segments severely and disproportionately impacted by the pandemic. According to CDC data posted in February, Hispanics were three times more likely to become infected with the virus than their Caucasian counterparts and at that time 20% of all COVID-19 deaths (then nearly 84,000) were Hispanics.

Although the economy continues to be the most important topic for Hispanics, it is not surprising that health care and the pandemic are top areas of concern. As the country shut down, Hispanics were affected the hardest, working as they do in high-risk, frontline industries such as agriculture, construction, landscaping, accommodations, food service and nursing care – none of which can be performed remotely. As their jobs were eliminated or their hours severely limited, income for these brand-loyal, high-buying-power consumers plummeted, resulting in a surge of stress and anxiety levels since many are not able to benefit from unemployment aid or stimulus checks and struggle to continue providing for their families.

These consumers live in highly dense communities, many in multifamily/multigenerational households, which means those having to leave to make a living are at risk of infecting not only themselves but several families under the same roof – increasing the pressure they feel and the fear for their own well-being and that of their household members. Losing jobs, friends and family members to this virus only fuels the feelings of uncertainty. Even with vaccines being distributed, it is difficult for this community to feel hopeful.

As of March 22, 2021, 44 million people were fully vaccinated nationwide but it was not until recent weeks that vaccine pods opened in Hispanic areas, finally reaching this underserved community. Given the inequities in general health care access among this segment, it is not surprising that access to vaccines was delayed.

Although it is important to be aware of this information, it is even more important to understand it and what it means for the Hispanic community. These circumstances have resulted in a shift of mind-set as a consumer. Hispanics had to become smarter shoppers, to make their dollar stretch by seeking and taking advantage of local help and resources available to them. Shopping for more bargains and making smaller grocery trips with a sharper focus on the essentials and necessities, as well as prioritizing purchases, are all part of their new approach. It is crucial that brands understand that consumers' preferences and likes have not necessarily changed but rather present circumstances such as limited stock of items at stores, loss of jobs, reduced income, financial uncertainty, death and illness have redirected their focus when shopping (what is on sale, generic/store brands vs. name brands, etc.).

The only way for brands to really understand Hispanics' current mind-set is to truly understand their situation and where their cultural stressors stem from to gain insights into their perspective as they are navigating a global pandemic. Cultural empathy – putting oneself in the position of someone from a different country/culture to truly understand their point of view – allows us to share their feelings, emotions and perspectives. Gaining cultural empathy will help brands redefine their marketing and research approach to continue resonating and connecting with these consumers. Hispanics represent brand loyalty and significant purchasing power – estimated at over $1 trillion. If they see that brands are working to value, appreciate and understand them as a segment through trying times, their buying power and loyalty will carry over after the pandemic.

Implications

Pre-COVID-19, methodology and research design only took into consideration representation of the various Hispanic segments in each market across acculturation levels and language preferences (Los Angeles – Mexican/Central American; New York – Dominican/Puerto Rican; Miami – Cuban/South American, etc.). Now, there are more factors to consider and account for when conducting research. Here are two of the most essential ones:

First, it is paramount that companies understand the importance of total representation of the Hispanic market when designing research and marketing plans. Furthermore, qualitative research needs to be conducted by a bilingual, bicultural researcher who shares the respondents' cultural experiences and understands the cultural nuances to translate the findings more accurately into actionable insights.

Second, because COVID-19 has affected different states/regions in different ways, the research approaches need to be specific to each location. Hispanics in different regions find themselves in different circumstances to their counterparts in other areas of the nation and by ensuring that the methodologies encompass these different geographic areas, companies can better understand consumers' mindsets in their current situations during and after this pandemic, resulting in a more accurate depiction of Hispanics as a whole and a clear overview of the cultural landscape.

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Placing a value on what we do

How to apply commercial thinking to the insights function

| By James Wycherley

snapshot

In this adaptation of two chapters from his book "Transforming Insight," the IMA's James Wycherley offers strategies for calculating the business impact of marketing research.

An insight team should aim to help its organization become more commercial by contributing quantified understanding about the financial implications of how and why consumers in its market become customers of that organization. The first steps are to develop a commercial foundation for all its work and to become adept at simple valuation techniques. These can help us to see customer issues through a financial lens and use the language of finance to make business recommendations.

These measures in themselves can make a significant difference for the organization and simultaneously enhance the insight team's reputation for commercial thinking and optimize its impact. However, to really make an ongoing difference, an insight team also has to demonstrate a commercial mind-set in its everyday activities, applying the understanding it has developed to the way it operates each week.

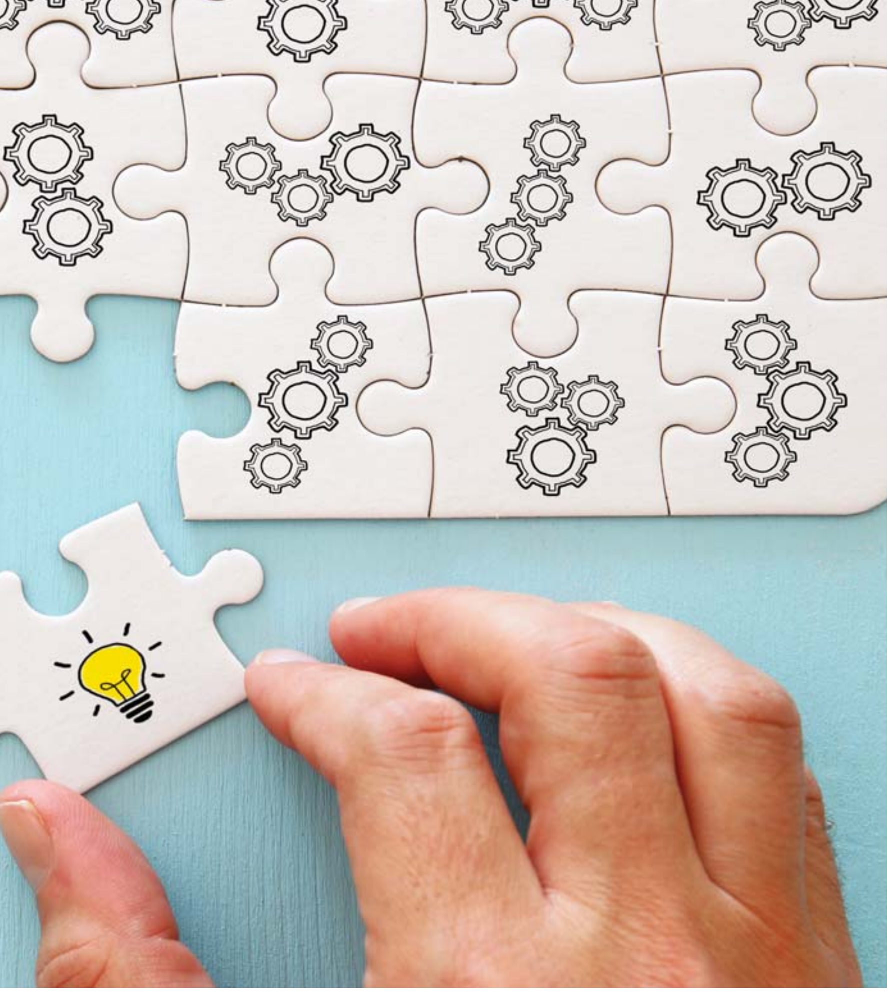
Three key ways

There are three key ways in which our insight teams can apply their commercial thinking: what we do – use value to prioritize our activity; how we do it – use each piece of work to identify value opportunities; and what we have done – record the value opportunities we have identified and those that have been actioned.

What we do

Most insight teams in the U.K., North America and Europe currently prioritize their activity using one of following methods:

- We do what we normally do.
- We respond to requests from those who shout loudest.
- We rank projects according to the seniority of the person who asked.
- We operate on a first-come, first-served basis.



These are all suboptimal for a progressive insight team. If our underlying purpose is to identify value and drive change, then we need to focus on business issues where we have the potential to add the most value. Therefore, one of the most tangible ways of optimizing impact is to reengineer our process for prioritizing the work that our teams do.

Valuation techniques should play a key part in the prioritization process, with a disproportionate focus given to projects that we estimate to have the biggest commercial upside. The good news is that once our teams have become accustomed to valuing projects, we can develop some simple rules of thumb that make the process even easier.

A good example of this comes from international brewers Molson Coors, which had one of the first insight teams to develop a matrix explaining to their business how the insight team would adopt a "full research – light research – no research" approach to requests based on the value of the brand in question and the nature of the business decision to be taken. Based on empirical data, the matrix helped everyone to understand that some decisions (for example, a major TV advertising campaign for one of its biggest beer brands like U.K. market-leader Carling) would justify a full research project, while a quick repackaging exercise for one of its smallest brands might not justify any new primary research at all.

How we do it

In previous work here at the Insight Management Academy (IMA), we have identified a seven-step process for nailing and investigating business issues. At each stage of that journey, corporate insight professionals can build on their commercial foundations and demonstrate a commercial mind-set.

Reflect: Before starting a new project we should always reflect on what we know and include within that our core stats and business blueprint.

Engage: Before responding to requests we need to speak to decision-makers, probing to understand the commercial context behind their request.

Diagnose: Using the SCQAB model (developed by Barbara Minto) to nail the issue and structure our thinking, we include core stats in the situation and complication sections and link our key question to the underlying sources of value.

Hypothesis: Our initial attempts to scope potential solutions should reference commercial realities and operational constraints.

Explore: Our focus will probably turn almost entirely to discovering relevant customer and market data at this point, but…

Interpret: …we must then interpret our customer and market evidence using the context of core stats and the business blueprint to see if our findings are commercially significant.

Opinions: Our recommendations for what the organization should do now must be based on commercial understanding, with the SCQAB benefits expressed in financial language.

What we have done

Too often there is a tendency to move on to the next project and lose sight of what our colleagues in other departments did with our insights. This is a real handicap to insight teams who want to optimize their impact. The best solution is to create a value log that records the projects undertaken and the potential opportunities identified, then arrange follow-up meetings with decision-makers to check what business activity happened as a result and how that affected revenue and costs. This data becomes invaluable for assessing future requests and the value log also becomes critical to one other aspect of insight effectiveness.

Adapted with permission from "Transforming Insight," by James Wycherley (published by Insight Management Academy, www.transforming-insight.com).

Requires an ongoing focus

Experience has taught us that adopting a commercial mind-set and applying it to day-to-day insight activity requires an ongoing focus and will only succeed if the insight leader role-models commercial behaviors and a champion is identified to reinforce those behaviors.

Everything to do with commerciality will probably feel a bit strange for lots of insight managers, researchers and analysts to start with and it is common for an initial bout of enthusiasm to be followed by a slide back into old habits. Value logs become neglected, prioritization of work reverts to how it was done before and the insight team misses out on a golden opportunity to optimize its impact. But a determined, visible leader, assisted by an enthusiastic team champion, can make all the difference.

The work is surely worth the effort. After all, putting a value to insight has been seen as a kind of Holy Grail for the market research and insight industry for a long time. However, the predominant view has usually been that it can't really be done because insight is simply part of a value chain – our work being one small part of a larger picture.

But is this really true? Let's consider a simplified business process to see if the argument holds water: initial idea >> research and development >> produce product >> market the product >> sell it and make money.

In new product development, for instance, a value can be placed on the overall process and the money it makes. But many people would argue that to place a value on any single element is not really possible, because anyone in the chain could claim that if they hadn't done their bit then the business would have made no money. We need the initial idea and the production and the selling to make any money at all.

This argument makes sense for all the elements that are really essential but it doesn't apply to elements that are discretionary. Steve Wills, who co-founded the IMA along with Sally Webb, uses car manufacture as an example. You cannot have a car at all without wheels, seats and a steering wheel, so you can't put an individual value on those elements. But there is lots of spend on cars that is discretionary – the material used on the seats and steering wheel, the cup holders, entertainment systems, sunroofs, etc. – and because these elements are not essential to the car's mechanical performance, they are discretionary and so the automotive industry can give us a choice about which we have and don't have and charge us extra for them.

'Insight-free' decisions

It might seem very odd for an article in a marketing research publication to argue that what insights teams do is actually discretionary. But when you stop and think about it, there are plenty of companies out there making decisions every day in a way that could be described as "insight-free." Either there is no customer and market research involved at all, or it is introduced too late to make much of a difference, or the quality of the research or analysis is suboptimal. The company that you work for probably has an insight team but consider all the decisions that it currently makes about new products, marketing, store closures, pricing, customer propositions and corporate strategy: Do you consider all these decisions to be completely and consistently insight-driven?

The reality is that our organizations will make hundreds of decisions every year that are not insight-driven. They may not be very good decisions but they are made anyway. This is what compels me to think that insight teams need to be more effective and that we should all learn from those that are. But it also demonstrates that the use of insights is discretionary and, like any part of a value chain that is discretionary, that means we can estimate the incremental value of including it.

Have most of the components

The good news is that if our insight teams are already completing the value logs they will already have most of the components they need to calculate the value of insight: the scale of the overall issue; the size of the prize associated with the specific business decision; the value opportunities identified by the insight team; and the actual benefits realized by the organization.

All we need to complete our calculation is the percentage of the benefits realized that can be assigned to the input from the insight team and then a comparison with how much that insight involvement really cost (research spend, data purchase, staff time – even database and infrastructure costs if you want to be truly comprehensive).

The sticking point for many insight teams is that they think they can't value their own input. But there are two bits of good news here.

First, aim for accuracy not precision. This applies to all our commercial valuation work, including the value we put on our own contribution. If you work through a few examples of the initiatives you have worked on, you will quickly discover that a successful business outcome is likely to be worth so much more to your business than the cost of most research, that the precise percentage assigned to insight's contribution is immaterial.

For example, if one of the IMA's members like Nestlé or Kraft-Heinz brings out a new product that adds $25 million to revenue and the insight team spent $125,000 on research and analysis, valuing the insight contribution at 5% of the $25 million would give you $1.25 million (hence a tenfold return on the $125,000 spent on insight). If you valued insight's contribution at 10% of the $25 million, that would give you a twentyfold return ($2.5 million divided by $125,000). These ROI figures are so high that even if you always took the lower of two estimates, the benefit of including insight is plain. What matters is not whether we contribute 5% or 10%, it's that we work on very large, successful business initiatives.

The second bit of good news is that we don't need to estimate the contribution percentage ourselves. eBay was one of the first IMA members to routinely ask colleagues in other departments to estimate their perception of insight's contribution. What surprised the insight team was that their colleagues in marketing and sales consistently valued the insight contribution more highly than the insight team themselves did. It wasn't unusual for the other departments to say that 25% or 30% of the value uplift was down to insight, whereas the insight team themselves were cautious about claiming more than 20%. Barclays insight team has seen the same phenomenon: its head of U.K. insight has a policy of not claiming more than 20% of the benefit of any initiative even if feedback from the business suggests that it was probably higher.

Calculate the uplift

The key takeaway here is that the return on an organization's investment in insight is likely to be very high but only if the team focuses its efforts on the biggest business issues. And that return will only be evident to anyone if the insight team itself starts to record the numbers and calculate the uplift. Of course we need input from colleagues in other departments but even if we only valued a proportion of our projects, it is likely that we would be seen to have paid back our organization many times its investment in insight. And that's always going to be a useful thing to know if we find ourselves defending our resources or arguing for an expansion in insight activity!

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••• kids research

How do you top your nachos?

Finding 'super awesome kids' for qualitative research

| By Pam Goldfarb Liss

snapshot

Pam Goldfarb Liss offers tips for conducting research with savvy kids.

Finding "super awesome kids" for your qualitative research studies is akin to tracking down the Holy Grail – and if you discover this treasure, you'll have engaging young people who will give you important perspectives for any business strategy you or your client are investigating. You know who these respondents are: They are articulate, savvy kids or teens who are able to provide the perspectives needed in a research study. They get it. They can tell you about their own personal opinions easily and know what they're talking about. They are key to the success of any qualitative research event.

My hope with this article is to give you a two-part process for designing the plan that will help you find your super awesome kids. Part one is defining the right respondents for your study. Part two is preparing your respondents so they can confidently share their own opinions. By doing this work upfront, you will help your young respondents be the awesome kids your project needs and make them feel more comfortable giving their great perspectives.

Clear in your screening

The wonderful thing about kids and teens is, unlike adults, most of them are exactly who they say they are. Thus it's even more important to ensure you are clear in your screening questionnaire. A recruiter who has been briefed on the qualities you are looking for in these special kid or teen respondents is equipped to make it happen.

Think of recruiting as the first part of this journey. The metaphor I'll use a few times in this article is nachos. Nachos are nachos, yes, but there are all sorts of toppings and sauces you can use to make them the great-tasting version you personally want, right? Similarly, you need to customize your screening questionnaire with specific things that will help you get the great kid respondents you need for your project.

Please remember that a recruiter is only as good as the screening questionnaire you give them. With kids, this is even more important, as

best-practices require a two-part and time-consuming recruiting process of speaking with parents first about usage context and qualification and follow-up directly with kids or teens for articulation and creativity. Allow for the time to recruit these kids, with three weeks to accommodate the various wait-times needed to get ahold of everyone.

Again, if you supply your recruiter with clear outlines and examples of the kinds of kids and teens you want in your group, you'll get the great kids you've envisioned, especially with a few tricks:

Ask mom and dad about them. In recruiting for super awesome kids, mom and dad are important. Parents know their child's overall ability to collaborate and share opinions. Parents know how much their kids use the product or service. If a parent is hesitant or unclear at any time during the screening questions, a recruiter should be free to disengage and move on. Empower your recruiters to judge – with your guidance, through examples of different nuances to watch out for – throughout your screener. A recruiter who knows what to listen for from parents and kids will get you great respondents.

Give them an audition. It is very important to look at the screening time with kids as a sort of audition. Plan for five questions. Make two of the five about articulation and on-the-spot creativity in open-ends. You know the ones: If you met an alien, what would you tell them is needed to make the best nachos? Or, if you could make the best nachos, what would you include in the recipe and why?

Help your recruiters. In recruiting for the super awesome kid, you should offer guidance to the recruiters in screener questions with open-ends. These recruiter notes underneath the screener question should make it clear that a child who might answer that nachos are made with just cheese and tortilla chips is not the kid you want in your group. You will mention in those recruiter notes that the kid who describes nachos with a specific cheese and uses well-chosen adjectives for the gooeyness of said cheese, along with detailing special additions like chili and layers of other items, is the respondent you want in your group. When your recruiter understands the kinds of respondent you want, everybody wins.

A side note: Be careful about recruiting for super awesome kids in friendship pairs. It takes longer to find these pairs and it's very difficult to capture lightning in a bottle twice. Friends don't often have differing opinions or even the same abilities to articulate them. Depending on my client's topic, for better-quality kids and differing perspectives, I often counsel clients to look at recruiting great kids who may not know each other beforehand. It is often a win-win if you can recruit articulate and passionate kids from different friendship circles. I do, however, love friendship pairs when talking about matters like race, abilities, education and hygiene that require sensitivity and connection to share. Be careful in considering recruiting approach because it is important to go for quality kids first.

The super awesome kid recruited using the strategies above becomes a true asset to any

Figure 1

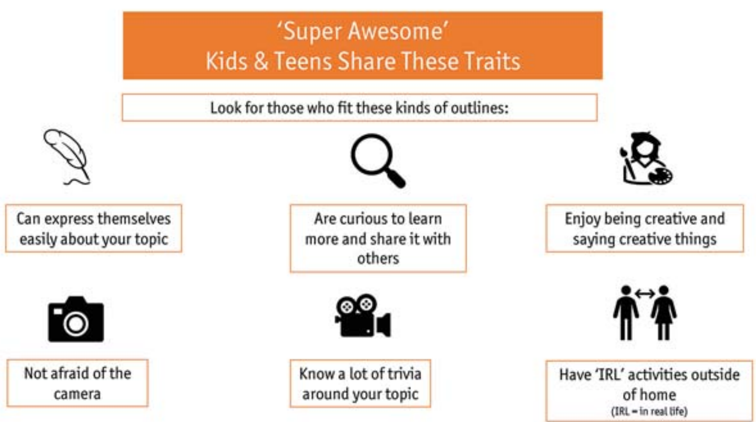

Figure 2

'Super Awesome Kids' Shine Best When...

- They are passionate about topic
- They have a lot of experience using product or service
- They come prepared with something to share in your discussion

qualitative research project. I love moderating when the recruiting process has gone flawlessly with kids and teens because the enlightened client who hears from one of these kids is always better for their perspective.

Need a little preparation

Unlike adults, kids need a little preparation to offer you the best insights. If conducting online communities or asynchronous qualitative research studies, preparation should be scheduled into the first day of research contributions to allow that peek into their everyday lives. If conducting live studies, homework or even a quick lobby survey prior to your qualitative research event makes a huge difference to move kids into thinking in the context of your study. It should be fun for them to share a bit about themselves with you. It should allow you a glimpse into their day-to-day. It should get kids thinking about the subject you want to learn more about in your study.

As an example of the kind of insight that can surface during pre-work, in a recent study for a kid-favored dessert product, pre-teens provided fun love letters to their favorite dessert and sent us photos, drawings and videos, narrating in their own language the shelves and cupboards of their snack cabinets and, most importantly, mom's private snack/dessert stash. This pre-work got our clients to acknowledge that moms buy the product as guilty pleasures for them as much as for their kids and gave our clients a fun platform to market the snacks not just to kids who love them for their delicious flavors but as a treat for moms too – something that would not have been revealed in our live online group discussion as it could potentially embarrass the moms.

Here are some additional suggestions:

- Open up pre-work assignments to their creativity and customization. Super awesome kids will want to make the assignment their own – personalize it with their own drawings or ways of seeing the world. Create an assignment that allows them to do this, whether it is a homework task like a snack diary or a pre-shopping/I-spy assignment or even a lobby survey. These efforts can offer open-ends that help them get in the mode of thinking about the moments you'll want to learn more about when you meet.
- Offer capability to work in multimedia. Super awesome kids are almost universally more able to express themselves using multimedia than most adults. This gives an even more exciting voice-of-the-consumer contribution to your study than anything you could ask them in an interview. When I can allow these kinds of pre-work assignments, I get a variety of helpful videos and drawings that provide really good dimension and context around an experience.
- Be flexible about submission deadlines. Kids and teens are overscheduled. Parents are protective about this. As a researcher, you will always get better and more fully thought-out ideas from a participant who has time to think about your questions. If possible, provide plenty of time for kids and teens to answer your questions. A week is ideal. If possible, allow parents to participate with kids. The project thinking will always be well-rounded when kids are partnered with their parents, who I've found rarely influence or bias but instead enhance their kids' input.

Feel great about sharing

The result of taking these two simple steps before you even meet your respondents in any kid or teen qualitative research event is that you'll have confident kids who will feel great about sharing their perspectives. Remember, kids are wonderful and with a little preparation you'll have amazing insights into their lives.

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••• the business of research

Can Detractors also be Promoters?

Study attempts to add nuance to NPS's likelihood to recommend

| By Julie Wittes Schlack

snapshot

Restaurant and automotive examples are used to illustrate an approach to help brands understand their competitive landscape.

The Net Promoter Score has lost some of its luster. Asking people about their intent to recommend a company or brand doesn't yield results nearly as meaningful or actionable as does behavioral data about what they've actually done. Still, behavioral data is intrinsically backwards-looking and brands rightly hunger for predictive measures. With that in mind, customer agency C Space experimented with combining two measures – one predictive and one retrospective. Using predictive markets supported by the FastFocus market research platform, we found that consumers' predictions regarding the likely recommendations (and detractions) made by others mapped closely to self-reported behavior measured by C Space's proprietary Earned Advocacy Scores. This suggests a potentially promising new approach, one that invites consumers to anticipate what brands/products are likely to succeed (or be polarizing) via use of predictive markets, then tracking real-world outcomes using behavioral metrics like purchase data and the Earned Advocacy Score.

In May 2019, Forbes magazine contributor Ron Shevlin unapologetically declared that "it's time to retire the Net Promoter Score." His arguments – that NPS fails to take customer demographics into account, doesn't explain why someone would or wouldn't recommend a company and, most importantly, that it measures intention as opposed to behavior – echoed those made by a growing number of executives who were increasingly uncomfortable with assessing business performance using such an opaque and unactionable metric.

At C Space we'd been hearing similar misgivings from our clients. As Christina Stahlkopf noted in an HBR Online article ("Where Net Promoter Score goes wrong"), "Increasingly, companies across industries approached us because they were struggling to understand their NPS, laboring to move it or unable to align it with data on customer behavior and wondering why."

To better understand customer advocacy, C Space launched its own study, testing a new methodology, the Earned Advocacy Score (EAS). In a 2019 survey of 13,175 people and a 2020 survey of 13,926 people, we first asked the standard NPS question about how likely people were to recommend

each brand. But it posed two more questions: "Have you recommended this brand?" and "Have you discouraged anyone from choosing this brand?" It also asked respondents to elaborate on the whys behind their responses.

Our goal was not just to learn what people had actually done (versus intended to do) but to capture the nuances in recommendations. After all, people are both complex and astute and what we recommend to whom is deeply rooted in context.

Though NPS assumes that a given individual can't be both a Promoter and a Detractor, our research revealed that 52% of all people who actively discouraged others from using a brand had also actively recommended it. That's because, as Stahlkopf notes, "When giving advice on a brand, consumers, like all good matchmakers, consider whether a pairing is right. For example, one person in our study (an NPS Passive) recommended Spotify to his friends for its ease of use and customizability but discouraged his parents from trying it because he felt it was too complicated and too expensive for them."

But while EAS provides a means of understanding consumers' past behavior, companies still hunger for predictive measures that can help them optimize their chances for success and avoid costly mistakes. So to support that objective, C Space decided to experiment with prediction markets used in combination with EAS.

Prediction markets use virtual currency and scarcity to mimic a real consumer experience. Participants are given a bank of tokens to invest in the likely success or failure of a group of products, ideas, candidates or brands. They are typically not asked about their own personal preferences but rather about what they think other people are likely to do, i.e., about outcomes, not intentions. Participants invest only in the options about which they have a strong opinion, can invest in the likely failure of an idea as well as in the likely success of one and invest as few or as many tokens as they want based on the strength of their confidence in their own predictions. When they invest, they provide an explanation of why they're doing it.

Study design

To capture behavioral data (albeit self-reported) we looked at EAS scores for automotive companies (1,889 respondents) and quick-service restaurants (2,115 respondents) captured in our 2020 survey. We then tested eight brands from each of the two categories in two separate predictive markets using a platform provided by FastFocus.

At the start of each market, we asked participants two questions: "Have you recommended any of these brands to people you know?" and "Have you discouraged anyone you know from buying any of these brands?" That enabled us to filter responses on the back end based on these self-reported behaviors.

Then, in the market itself, we instructed participants as follows: "Welcome to the Prediction Market, where we'd like you to anticipate what automotive [or fast-food] brands people are most (or least) likely to suggest to others. Invest as few or as many positive tokens as you want in the brands you think other people are most likely to recommend. Feel free to invest negative tokens in the car [or restaurant] brands you think people would advise others against buying."

We tested eight brands in each market and each participant had a total of 12 tokens to invest.

Results

First, a quick explanation of the scores shown in Table 1:

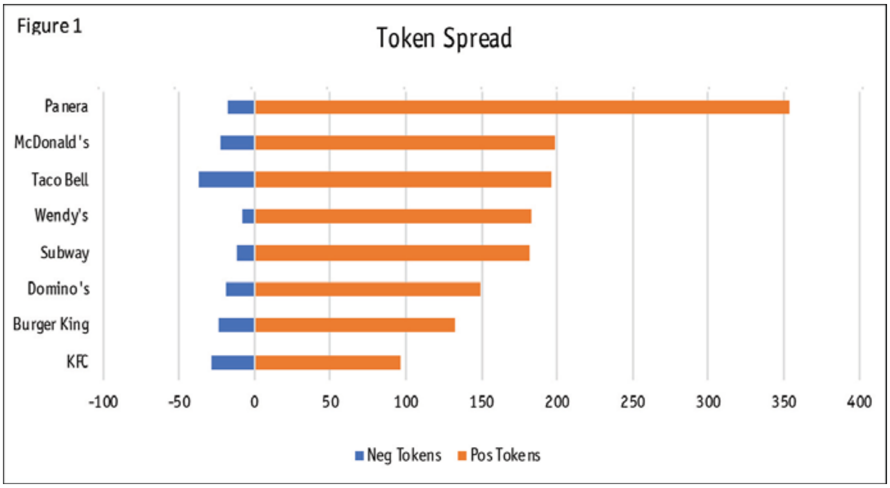
- EAS is calculated by subtracting the percentage of respondents who have advised others against a brand from the percentage of respondents who have recommended that brand to others.
- NPS is calculated by subtracting the percentage of Detractors (those choosing a likelihood to recommend of 0-6 on an 11-point scale) from the percentage of Promoters (those choosing a likelihood to recommend of 9 or 10 on an 11-point scale).

The FastFocus Passion Score captures the percentage of customers who are passionately positive about an idea or prediction and is calculated using a proprietary algorithm that considers the

Table 1

EAS	NPS	Passion Score
Wendy's (47%)	Panera (-3)	Panera (42%)
Taco Bell (41%)	Wendy's (-4)	McDonald's (24%)
Panera (40%)	Taco Bell (-15)	Taco Bell (23%)
Domino's (39%)	Subway (-15)	Wendy's (19%)
Subway (38%)	KFC (-17)	Subway (15%)
KFC (35%)	Burger King (-23)	Domino's (13%)
Burger King (30%)	Domino's (-26)	Burger King (20%)
McDonald's (24%)	McDonald's (-26)	KFC (7%)

Figure 1



number of tokens available to be invested, the number of ideas/predictions and the investment patterns of individual respondents.

In the quick-service restaurant market (N=142), the rankings were generally similar but with one notable difference in the Passion Score for McDonald's.

In the EAS data, Wendy's had the highest score, followed by Taco Bell and Panera. The NPS data showed these same three brands in the top three (along with Subway) but with Panera coming out on top rather than Wendy's.

In the FastFocus prediction market, Panera not only came out as No. 1 but earned an exceptionally high Passion Score of 42%. As with the other two measures, Taco Bell also emerged in the top three. But unlike the other two measures, McDonald's landed in the top three as well in its Passion Score.

Why did McDonald's perform so well in the Passion Score as compared to either EAS or NPS? The Passion Score adds a potentially useful nuance, as it helps both to identify brands about which respondents are especially partial and to identify brands that may not be universally beloved but have a cadre of hardcore loyalists. That's because it measures grades of promotion quantitatively (in the number of tokens invested) as well as qualitatively, with verbatims providing rich rationale as they do in the EAS.

These nuances are reflected in the token spread in the prediction market (Figure 1), which shows how tokens were allocated, positively and negatively, across the brands being tested.

Panera garnered so many tokens because it had the highest number of positive investors (100), the fewest number of negative investors (7) and the highest average investment (3.53).

Similarly, McDonald's outperformed some other brands in the prediction market, largely on the strength of the question being asked – not "What do you like?" or "Have/would you recommend?" but rather "What are other people likely to recommend?"

"I don't care for them much anymore but they're everywhere and always have been. They also have happy meals and every kid loves happy meals."

Like the savvy young man who recommended Spotify to his friends but not to his parents, several of those investing heavily in McDonald's in the prediction market were able to transcend their own personal preferences and draw on their knowledge of other factors that drive recommendations and purchase behavior.

In the automotive market (Table 2) we saw a similar pattern, with a good deal of overlap in the top performers. But just as McDonald's Passion Scores drove it up in the quick-service restaurant prediction market rankings, similarly robust scores for Ford propelled it higher in the prediction market rankings than in the other two data sets – and for similar reasons. Because the prediction market asked not about personal experience or preferences but rather about what others would do, respondents were able to factor in word-of-mouth reputation and/or service statistics, as illustrated here:

"My family swears by Fords. I have not had one myself but I always hear from people how they never break down."

Implications

As brands try to better understand and improve their performance drivers, this research suggests some shifts in how they might want to approach metrics.

Focus on behavior in how you measure not just in what you measure. Like the NPS, which classifies most respondents as Promoters or Detractors, the prediction market identifies which brands are polarizing through its token spread chart and passion score. But like the EAS (and unlike the NPS), it is rooted in behavior; it requires people not just to choose a rating scale number reflecting their intentions but to actively invest for and/or against specific brands. And because they are doing so in the context of scarcity, i.e., because they have a limited number of tokens to invest, we can assume that these investments carry greater cognitive and emotional weight.

Cast a wider net beyond personal preferences. Unlike either metric, prediction markets ask not about personal behavior or intention but about what real-world outcomes respondents anticipate based on knowledge about trends, the category, the brand and word-of-mouth.

"I've never had [Panera] but people are starting to eat healthier so think it's a good [investment]."

"I'm not too familiar with Panera as much as I would like. It's been recommended to me by friends and family."

In both of these cases, it is safe to assume that given their lack of personal experience, these respondents would have given Panera a "likelihood to recom-

Table 2

EAS	NPS	Passion Score
Subaru (66%)	Honda (42)	Toyota (44%)
Toyota (65%)	Toyota (32)	Honda (38%)
Honda (65%)	Subaru (24)	Ford (27%)
BMW (54%)	Audi (22)	Subaru (19%)
Audi (50%)	BMW (20)	BMW (16%)
Nissan (48%)	Mercedes (15)	Nissan (12%)
Mercedes (46%)	Nissan (10)	Mercedes (9%)
Ford (41%)	Ford (3)	Audi (8%)

Table 3

Rationale for Investing in Ford	Brands Recommended to Others in the Past Year
I've owned a few and I love them	Ford, Honda, Nissan
Good designs and fun to drive	Ford, Honda, Toyota
American-made and affordable to maintain and buy	Ford, Subaru
A good strong American car company that is making good investments	Ford, Subaru
It's a great vehicle with easy-to-find parts	Honda, Ford, Nissan, Toyota, Subaru

mend" score in an NPS survey of less than 9, making them Neutrals or Detractors. But just as the EAS enables people to report on their actual behavior, the prediction market lets them make informed guesses as to the behavior of others, independent of their own experience.

Employ multiple metrics to get a more holistic view. Just as prediction markets echo NPS in reflecting which brands/products are especially polarizing, they echo the EAS methodology in recognizing the weight of behavior. That becomes evident when we filter Passion Scores to look at just those individuals who have recommended a given brand in the past.

For example, Toyota (which had a No. 1 or No. 2 ranking in every methodology employed) had a Passion Score of 44% and an Idea Score of 203. (The Idea Score indicates how broadly embraced an idea or prediction is, with a score of 100 represented as an average. Thus a score of 203 is 103% higher than average.)

But when we filtered on just the subset of respondents who had actually recommended a Toyota to others in the past, its Passion Score increased to 77% and its Idea Score to 330. While this correlation isn't surprising, it does reinforce the notion implicit in the EAS, which is that past behavior is likely a better predictor of attitudes and future behavior than the more abstract question of "likelihood" to recommend.

Because NPS only effectively deals with extremes (Promoters and Detractors) EAS is potentially a better measure of post-sales preferences and influences. Coupled with the Passion Score (which adds the element of scarcity and effectively ignores the detractors), it may provide a fuller, more actionable picture of how consumers will act.

As an example, let's look again at the automotive data. Without the Passion Score, Ford would infer it has a problem. Despite a 41% EAS, it is the lowest-ranked brand. But layering in the Passion Score (27%) provides Ford with the metric it needs to understand that a subset of people feel strongly positive in relation to the brand.

In this way the Passion Score coupled with the EAS can provide more granularity between what NPS would classify as Neutral and Promoter with respondents who were passionate enough to invest multiple positive tokens (and/or to recommend Ford to some of their friends).

Use recommendations (for and against) to better understand the competitive landscape. When we filtered prediction market data on just the subset of respondents who had advised others against a specific brand, we got some interesting insights into the competitive landscape. For instance, those who advised against lower-priced cars like Toyota did not award the highest Idea Scores to premium brands like BMW or Mercedes. Rather, they favored brands that are comparable in terms of price and features (e.g., Subaru). Those who advised against Fords gave Nissan and Toyota the highest scores, thereby confirming who each of these brands' most likely competitors are.

But there are other lessons to be learned from Detractors as well. For example, those who had advised others against luxury brands like Mercedes and BMW gave the highest Idea Scores to Toyota, suggesting that the latter may have greater opportunities to make inroads into the traditional luxury market. Those who had recommended that others avoid McDonald's gave Taco Bell an overwhelmingly high Idea Score but showed respect for Wendy's and Burger King as well, suggesting that their antipathy to McDonald's doesn't necessarily signal opposition to burgers in general.

We also got a better understanding of the competitive landscape by focusing on those respondents who were positively passionate and saw interesting patterns even when price was not a big factor. For example, in the quick-service restaurant prediction market, while those who had recommended Panera in the past also gave it the highest overall Idea Score, Wendy's came in a close second and vice versa. By seeing which other brands are appealing to their most devoted consumers, each of these brands can learn how to further enhance their menus and/or messaging.

The automotive market also yielded a richer understanding of the competitive landscape when we focused on the relationship between prediction market investment behavior and real-world recommendations via EAS. For example, when we looked at the middle range of Promoters (those allocating three positive tokens to Ford, where the maximum investment was seven tokens), we saw that 58% had recommend Ford (along with Subaru, Toyota and Honda) – the top brands in our EAS data. The verbatims shown in Table 3 revealed why.

While our sample sizes are small, these findings whet our appetite to further explore how EAS and prediction markets together might help brands better understand the competitive landscape – their vulnerabilities, opportunities and the consumer word-of-mouth that drives both.

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••• the business of research

Better together

A Q&A with Duracell's Ray Iveson

| By Joseph Rydholm

snapshot

How Duracell combined implicit methods with traditional research to explore battery buyers' needs

For many consumers, batteries are a commodity. Other than steering clear of off-label dollar-store power cells, the conventional wisdom is that a battery is a battery. Sure, countless ad campaigns have been launched and marketing dollars spent to convince us to the contrary but in the eyes of most, whatever's on sale is fine.

Battery maker Duracell has been working to change that perception by creating proprietary battery performance metrics and introducing new types of alkaline battery and implicit research methods like eye tracking and galvanic skin response measurements have been a key to its efforts, says Ray Iveson, vice president of methods and measurements and global quality assurance at Duracell.

At the outset of our Q&A (presented here edited for length and clarity) he was quick to stress that he's not a marketing researcher and that, aware he was being interviewed by a marketing research magazine, he views biometric research tools as supplements to – not replacements for – consumer research. Rather, he says, they're part of a combined approach that offers companies a way to incorporate customer needs and wants to inform product development, something he learned the value of during his time at Procter & Gamble. After getting his master's degree in biomedical engineering he worked at P&G in the skincare category developing new tools for measuring skin properties (visual appearance, color, etc.) and then did stints in haircare and laundry before landing at Duracell, which was owned by P&G at the time.

Quirk's: P&G's focus on the consumer is pretty legendary and it sounds like that has really stuck with you.

Iveson: I'm a measurement scientist and I've got almost 30 years now in doing measurements. And the similarities in what you need to do are amazing, regardless of the product you're working on, especially in consumer packaged products. You have to start with the consumer because

if you don't know what the consumer both desires and doesn't desire, you can't translate it into the proper measurements that you need to make for your products. So you always have to start with the consumer.

So that's kind of the background as to where I am today. Now I'm heading up the methods and measurements group and global quality assurance within Duracell. And my focus has been mostly on measurement science. But, as I said, you have to start first with the consumer, which is why we were so interested in integrating the implicit consumer feedback measures that we do today.

How did you determine which one or ones you wanted to use?

That was kind of a trial-and-error experiment. I mean, that's the nature of research and development. You don't always know what's going to work and not work. There are traditional technical measurements of battery performance and there are traditional measurements of consumer feedback. And we would use probably what you're familiar with – home use testing, panel tests or even direct consumer feedback – to help guide the product design strategy and the optimizations that we would do on our products. And that had been the nature of Duracell's product design strategy until I arrived. But in my 24 years in Procter I learned that you can't always trust that what a consumer tells you will be the whole picture of what they desire or don't desire. And so that's where we started to bring in the implicit measurement tools.

We brought them in and started using them to see what would give us a more complete picture of what the consumer desired, from both a battery and a battery-powered device experience. It took us a while to get to the state that we are today in terms of what we now use to objectify, if you will, the consumer response, and use that to help guide our product design experience. But the tools from iMotions were kind of our first foray into this area. So they had multiple tools available or within their suite – eye tracking, pupil-size measurement, facial expression analysis and [galvanic skin response]. And so we brought those tools in to try to figure out which ones would give us a more complete picture of consumer response.

Can you talk about why it's helpful to use the implicit methods along with or instead of the explicit methods?

What I would first say is we don't use them instead of; we use them to supplement. We use all of the traditional measures of the industry and we continue to use the explicit measures with consumers but we now supplement them with the implicit. The advantage that the implicit gives you is, as soon as you ask a consumer a question, regardless of whether you intend to or not, you can bias them in their response. With implicit measures you're not asking anything, you're merely measuring physiological response to a stimulus. And that advantage is huge in trying to build the complete picture of the response and what the consumer is actually valuing in the stimulus that you provide to them.

The other one that I'll bring up is, I've dealt with consumer response across a number of different [product category] stimuli and I've found that in almost every measurement a consumer makes, they are non-linear in their response. And so having a way to objectively measure their response allows us to see exactly where they are linear and where they are non-linear. What I mean by that is if you presented a scale of 1-10 for a specific attribute, you might assume that the difference between a 5 and a 6 is the same as the difference between the 7 and 8. But when you line up those measures versus implicit data or technical data of that stimulus, you'll often find that the consumer is non-linear in the way they use those scales.

What are some of the things that you learned about the processes that consumers go through when they're buying batteries and what some of their considerations are? Is it just durability and price?

We know that there are numerous factors that affect consumer purchase behavior. And so it could be price, it could be battery life, it could be marketing. What you say about the product can have a big impact on what people will purchase. But the area that my team focuses on is value. And part of the equation in value that we focus on is product performance or device experience. So the way we quantify value is, how much performance or experience are we giving you in your device versus the price that you're paying? I don't do the work on the marketing area, I'm in research and development, but I want to build batteries that will give the consumer the greatest value for the price that they pay.

And so my focus is specifically on that area: What are the things that we can do in designing our batteries to help give greater value to the consumer? In doing this work obviously we have to use both implicit as well as explicit measurements of the consumer but we use industry-standard measures of the battery and our own proprietary measures on the battery. An example I can give you for how this would play out would be if I look at some of the research we've done on our alkaline batteries. We measured consumers' explicit and implicit responses to device performance of flashlights. We powered [the flashlights] with both commercially available alkaline batteries and prototype alkaline batteries. And we found that in their combination of implicit and explicit response that they were not revealing all of what they ended up telling us they desired in their explicit responses.

So we used the implicit data to help set new targets for those batteries. And we actually were able to design batteries that are blind-test winners against all commercially available alkaline batteries in the marketplace today. With the combination of implicit and explicit, we found new targets for what the battery should do. And then from that, we designed batteries that perform better than anything in the market from a consumer perception standpoint. We took those newly designed batteries and put a black label over them so that nobody knew what they were. We took batteries from the marketplace and removed the labels and put black labels over them and tested them with the consumers. And when we did that with these new, redesigned batteries we found that the new design won against all other alkaline batteries in the market without exception.

With the combination of implicit and explicit, we found new targets for what the battery should do. And then from that, we designed batteries that perform better than anything in the market from a consumer perception standpoint.

The advantage of this iMotions platform, at least versus anything else we looked at, was that it measures multiple attributes. So having that ability to synchronize that data starts to allow you to develop new analytics, the outputs of those measurements that will allow you to get to a better place. For example, facial expressions speak volumes but your interpretation of that expression will be different from mine. And so having a tool that quantifies it down to an objective endpoint gets us to a way of taking these kind of nebulous and interpretable outputs into something that you can use in real science. So that is the platform that we used to kind of integrate with our explicit measurements to end up getting to that new battery design.

Did you have to convince any internal stakeholders of the value of using this approach? Can you walk me through that process of getting people up to speed on what biometrics are and how they work?

We brought in the implicit tools and tried them out. We found some insights that we thought were important to changing the way we design batteries going forward. We ended up executing the prototypes against those new targets, testing them back with consumers, still using the implicit tools to kind of fill the picture with the explicit responses.

It took us a while to get there – probably four years. But at the end of the day what made it easier to communicate and convince people of the value of these implicit tools was the fact that we went through full-cycle product development, launched a product and then tested it with consumers and showed that it was the right product for the consumer – even though their explicit feedback before that cycle would never have gotten us to that point, would never have told us that was the right way to design batteries.

And then once we built the product and put it into the marketplace, it was that blind testing that I told you about, when we went back and tested it with consumers and the consumers reported back to us that that was a clear winner versus what was already in the marketplace. That was all that it took to convince the company.

Were there any differences between what people told you or indicated was important for them in a battery versus what you found out from their physiological responses?

If you ask people what they want from a battery, what they'll repeat back to you is what they've been told or what they expect that you'll want to hear. And that generally is about the longevity of the battery. Because that's the way batteries have been spoken about as an industry for [decades]. But if we design a battery that changes how a device performs, how does the consumer respond? Now, they may never in 100 years mention the device performance if you ask them. But how the device performs is part of what is important to the way we will design our batteries going forward. So we can manipulate the design to get different device performance. Figuring out what the optimal performance is through both the explicit and implicit measures was part of the key to identifying how we wanted to design the battery.

Duracell wants to use insights to advance how batteries are evaluated by all major industry players. Can you talk about that a bit?

There are industry standards for how battery performance is measured. And they're incredibly valuable but one of the things that we've found is that how you technically measure product performance has to emanate from what the consumer desires and doesn't desire. And those industry standards, while they're very important, they're tending to lag behind the electronics industry and the device marketplace. They don't change as frequently as the marketplace changes. So we've had to design some proprietary battery performance measurements and analytics that match up better to what our consumer response data tells us in order to get to a different place. You can't just rely on just the standards, you can't rely on the explicit feedback; you actually have to bring things to the point of some different measurements that match up better to what the whole picture, the whole consumer response is telling you. And I obviously can't give away the proprietary pieces but we've developed proprietary measurements and analytics to match it better to the consumer response that we were able to measure.

Have you seen any changes in consumer buying or what consumers say they want from batteries during the pandemic?

I think we've seen greater levels of battery purchase, because you've got more home offices, more home schoolers using wireless devices powered by batteries. And then we've seen an increase in gaming with so many people at home and many gaming devices require batteries. I'd like to believe the change in choice of batteries is more related to what we've been talking about, which is that we've designed a battery to do something very different versus the normal alkaline battery in the marketplace. And thus the choice is being swayed by its performance or the devices' performance with the battery.

Any final thoughts on the value of consumer feedback – in all its forms?

To us, understanding what the consumer wants is core to designing the right products. [It's a process] where you start with the consumer to figure out how you measure the right performance to develop the right products. Without the consumer, if you're just doing it in isolation, sorry, but you've got it completely wrong. It has to start with the consumer.

••• shopper insights

Timing is (almost) everything

When to – and when not to – use research for direct-to-consumer marketing

| By Loralie Parrish

snapshot

Loralie Parrish looks at the stages and roles of research in DTC marketing.

No one can deny the importance of research as a valuable marketing tool. Every smart marketer starts by utilizing research to evaluate everything from the media marketplace, the category, competitors' media activity and much more. It's an absolute necessity for any smart marketer to use as part of their planning process, rather than just haphazardly throwing things against the wall to see what sticks. But beware that it can also be a pitfall and lead even the savviest person down a rabbit hole if it is not used at the right time and for the right reasons. So, let's dive deeper into the "when," "what" and "why" research is most effective.

For direct-to-consumer (DTC) marketers there are three primary stages when research should be leveraged to be most successful: planning, testing and optimization. Whether or not you start your process with secondary research (data compiled from an outside or third-party source such as MRI, Nielsen, etc.) or primary research (such as internal data, focus groups, etc.), the types of research used at each stage will vary depending on the goals of the strategy and the desired outcomes.

An expert understanding

During the planning stage, it's critical for DTC marketers to conduct research that provides an expert understanding of the brand's historical

campaign and sales data, the product, competitors, the industry situation and, of course, the audience opportunity. When it comes to understanding the customer, many marketers will default to primary research only, doing focus groups, surveys and social listening. Although a common mistake, it's a big one, and an unnecessary use of marketing dollars at this point. Those of us who have been in the industry for years understand that what people say in a focus group or on a survey and what they actually do in real life can be conflicting. Why? Because of societal pressures or desires to be perceived in a certain light. Even the national thinktank Populace has reinforced this point with its research study on long-term national values between Republicans and Democrats. Thank you Todd Rose, co-founder and president of Populace, for openly admitting that people sometimes say what they think others want to hear.

When it comes to understanding the customer, we have two fail-safe options during planning. First is to default to the details of the historical marketing data. That behavior data will tell a marketer if the consumers who have been targeted are the right or wrong audience going forward. How, you ask? I remember something I read in my college marketing textbook that explains this concept very well. Mazda launched its new two-seater sports car in 1989. It implemented a huge multimedia campaign targeting young moms. Why? Based on its primary research from focus groups and surveys, it identified young moms as its target audience, assuming the sporty two-seater would be an easy vehicle to use to go to the store and run errands around town. Surprise, surprise, this campaign was a complete flop. The Mazda Miata actually resonated with middle-aged men (hitting a mid-life crisis) who wanted an affordable sports car.

The second fail-safe option is if it is a new-to-market product and there is no historical data, the best bet is to simply throw a wider net by including audience segmentation testing and collect as much campaign behavior data as possible for analysis and optimization in other marketing stages. This will allow you to determine which target audience responds the strongest.

Keep in mind, I am not saying that primary research data isn't important, because it is. However, it's much more useful during testing than it is during the planning stage. This is the

perfect time in the marketing cycle to bust out the primary consumer research and combine with campaign behavior data. Once the marketing team understands what has worked and what has not, based on behavior data, a test plan can be implemented that includes variations on messaging, product benefits, offers and media placement. The fun part is taking the voice-of-the-customer data collected in primary research to add additional layers of test messaging, customer journeys, imagery, calls-to-action, etc. Once executed, those tests based on the voice of the customer can absolutely be validated as true or false using the campaign behavior data, hence closing that gap we addressed previously that what people say and what they do can conflict.

The most exciting research stage happens after we launch a campaign and begin to collect our own data. Optimization would not be possible without research and analysis into campaign behavior data. It's what connects planning to testing, creating an ongoing cycle of improvement. As marketers dig into the abundance of data that can be collected from the breadcrumbs that consumers leave online, with customer service, using an app or even using coupons at a retail store, several key questions can be answered. How many interactions or ads does it take to drive a purchase? Where else are customers shopping? Which target audience is the most cost-effective? Which channel is the most effective? Are different types of customers responsive to different channels? Which calls-to-action are more effective?

I could keep going but you get the point. Now armed with intelligence from data, marketers can be agile in shifting dollars from a poor-performing channel to new channels (back to the testing) and to channels that are high-performing. The end game is always to find the path to the greatest ROI.

Put it in practice

Getting away from theory, I have two examples where the team at our firm put the above in practice. First is with a brand everyone should know, SodaStream. Before approaching us, it made assumptions and based its market position on purchase drivers for consumers in other countries. Specifically, for consumers abroad, environmental responsibility and being "green" were the core reasons to buy and use a product like SodaStream. It went to market in the U.S. with that messaging and performance was significantly lower than it had seen in other countries. We started over with the planning process and because we had historical behavior data, we knew to take a different approach. Changing up the messaging and positioning platform to focus on health and wellness, we went to market with a DTC strategy. Jackpot! Through analysis into the core source of truth, campaign behavior data, we learned consumers would make a purchase decision to be healthier or lose weight versus environmental reasons. The "green" part was simply a nice afterthought versus a purchase driver for Americans. The results of our shifting direction were so impressive that it got the attention of PepsiCo, which ultimately purchased SodaStream for $3.2 billion.

Another great example is with Cubii, a startup company with a compact under-the-desk elliptical machine. Cubii conducted early primary research identifying a younger demographic as its core audience for its newly launched product that lets you "get fit while you sit." Although Cubii felt confident in its young-professional target audience, we were skeptical. As a result, we threw a wider net and developed creative and a media test that included audience segmentation testing reaching both young professionals and the senior audience. Test results quickly indicated that this product resonated best with seniors and we quickly adjusted our media strategy and were poised for rollout. This discovery and the exceptional results positioned Cubii to be acquired in Q4 2020 for $100 million. And to think this little startup could have failed if it continued down its initial path.

The important point in both examples is that the right type of research at the right stage of your marketing efforts is critical to ultimate success and growth of your business.

Learning and adapting

Marketers always need to be learning and adapting. Determining the best research tool for your challenge should be based on the goals of your strategy and your desired outcomes. There is also an appropriate time to incorporate intelligence from both primary and secondary research. And don't forget that no matter if it is primary voice-of-the-customer research, secondary market research or behavior data research, nothing should be viewed in a vacuum or your marketing strategy could fail. Even with campaign behavior data as the core source of truth in DTC, marketers must review several data points to make critical decisions and report meaningful outcomes.

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••• packaging research

From availability to sustainability

Incorporating sustainability into the post-pandemic shopper marketing ecosystem

| By Erik Olsen

snapshot

How packaging can communicate a company's eco-friendly aims.

We are now more than a full calendar year into a pandemic which has redefined "normal." As COVID-19 gripped societies across the globe, consumer behavior evolved in lockstep. Availability quickly became the primary driver of choice for many categories – many of us would like to forget the endless (and largely unsuccessful) searches for toilet paper, disinfectant wipes, pasta and other household staples throughout last spring and summer.

It was unlike anything most have experienced as consumers and with that uncertainty came a shift away from browsing, looking for something new to try and perhaps bigger-picture societal initiatives (e.g., sustainability) that might influence our decisions. Our behaviors were focused on simply finding what we needed and leaving the store as quickly as possible. In New York City for example, an eco-friendly switch to paper or reusable bags – implemented just before the outbreak – was suspended to minimize further virus transmission, allowing retailers to bring back plastic bags at checkout.

But as we gradually emerge from the worst of the pandemic, concerns about the long-term health of our planet are resurfacing. After a long year of challenges trying to keep supply chains intact and meet overwhelming demand, brands are once again turning their strategies and efforts toward sustainability.

Fit within the larger story

So, what does that mean for marketers with a sustainability story to tell? How does this narrative fit within the larger brand and product story? Let's try and unpack things a bit.

At its core, the idea of sustainability can encompass a wide range of questions for shoppers during their purchase journey:

- Is the product itself sustainable in terms of how materials are sourced?
- Is the packaging made in a sustainable way (i.e., from recycled materials)?

• Can the packaging be recycled once the product is removed?
• Can the packaging be reused in the home for another purpose?

These are all fair questions that can impact the strength of any sustainability message. But we must also consider how perceived answers to these questions might compete with potential trade-offs tied to the end-user experience:

• Will it impact satisfaction (e.g., taste, efficacy, etc.)?
• Will it impact functionality (e.g., portability, durability, safety, etc.)?
• Am I getting less product or paying more for the same (e.g., a weaker value)?

The implication from a packaging standpoint is clear but challenging. And a classic case of what shoppers say vs. what they actually do.

On one hand, ever-dwindling attention spans and endless choices means our System 1 thinking will be hard at work narrowing our focus to what is truly important. As a result, brands must leverage packaging to deliver a clear and compelling story to potential buyers about their products. Remember the five Ws of journalism? Packaging must help shoppers investigate their options: Who is it made by? What benefit does it provide (and when)? Where can I find it? Why is it relevant?

If unsuccessful at any of these most fundamental levels, a product is at risk of being de-selected – the ultimate purchase barrier – well before any sustainability message can impact behavior. We know from watching shoppers scan thousands of packages across categories that most only engage with two or three primary messages on the label before moving on. So, these answers need to resonate quickly.

Of course, some brands were developed with an eco-friendly positioning from day one (e.g., Seventh Generation). But the large majority of products must delicately fold this message into an already cluttered brand promise.

Virtually no mentions

To further support this idea, our firm analyzed online search data from shoppers visiting grocery retailer websites to understand what is top-of-mind when forming their consideration sets. The most common search terms are many of the usual suspects we all have on our weekly shopping lists – cheese, chicken, beef, milk, bread, butter, chips, eggs, etc. Meanwhile, there were virtually no mentions tied to sustainability – including “eco-friendly” or “environmentally-friendly” searches.

While not surprising, this reinforces the functional mind-set of shoppers at this stage of their purchase journey.

On the other hand, sustainability is a more rational and thought-provoking concept, a longer-term goal that goes against the grain of the System 1 behavior driving so many of our immediate purchases. All else being equal, most consumers do not question the positives tied to brands pursuing more sustainable offerings and would favor a product that is better for the environment.

But in competitive product categories (e.g., FMCG), rarely is there a level playing field. Brands are endlessly competing for attention and awareness no matter their shelf footprint (i.e., facings) and placement. And beyond those important variables, we must also factor in the impact of the global pandemic.

Studies before COVID-19 revealed as high as 50% of shoppers in the U.S. (and even higher numbers globally) claimed they were ready to change shopping habits to reduce negative impact on the environment. But recently more cost-conscious consumers are raising doubts that they would make sustainable choices if the value equation changed (e.g., paying more for the same amount or the same amount for less product). One study recording priorities in U.K. shopper considerations reported that only 4% of shoppers said they would switch brands because of a more sustainable packaging option.

And in the world of shopper marketing, perception is very much reality. If a potential buyer perceives they are getting less bang for their buck, regardless of the actual equation, an additional barrier now sits between them and mak-

ing that purchase. And as many shoppers are not experts in sustainability terminology (down to the legends and symbols of the regulating bodies who authenticate what thresholds must be met), those quick interpretations will play an even greater role at the point of sale. Essentially, brands need to make sure that the benefits outweigh the barriers – a delicate balance across the entirety of the marketing mix.

At Behaviorally, we've tracked shopper sentiment over the last six-plus months to gauge overall perceptions about how well brands are succeeding at being environmentally sustainable. Across countries and categories this amounted to over 85,000 shoppers spanning ages 18-69.

The most noteworthy insight we uncovered is the skepticism of younger shoppers – particularly those under age 40. Across categories and countries (U.S. and U.K.) this audience is significantly more likely to disagree that brands are doing a great job with their existing sustainability practices. In most cases, these negative levels range between 35-40% of this age group, while older age targets exhibit a more positive (or at least neutral) perception.

So, what does all this mean? As brands further emphasize sustainable practices within their marketing efforts, consider these three key points:

1. Younger shoppers would be receptive to a compelling sustainability message...

The consistent sentiment across categories and countries suggests the negative perception among the under-40 audience is less about the kind of product/brand in question and more about the shopper mind-set. Younger consumers are more skeptical or perhaps looking at brand values more critically and as a result hold brands to a higher standard when it comes to sustainability. They believe brands can – and should – do better.

As younger generations have grown up through the emergence of social media, they are more likely to be using these platforms than older consumers. Brand websites, Instagram profiles and Twitter, among others, provide an effective vehicle to deliver these narratives and interact with their potential buyers.

If compelling, generating traffic to these messages can give brands a leg up on competitors as shoppers think about brands that are relevant to them. While it may not be the ultimate decision driver the next time they shop the category, it will at minimum raise awareness and possibly create a more "active search" for this brand.

2. ...and these messages should focus on clear, tangible benefits.

This amounts to a terrific opportunity for brands to celebrate their efforts at creating sustainable products. For example, Waste Management uses its sponsorship of the Phoenix Open golf tournament to showcase its ability in diverting 100% of the waste associated with the tournament away from the landfill. It's as much about the optics and how it is communicated – the wow factor of seeing "100%" of something is a pretty rare feat – as it is about the actual accomplishment.

3. Packaging must remain focused on the fundamentals.

Digital touchpoints are a convenient and relevant tool for brands to communicate sustainable benefits to consumers – especially those in the younger demographic. But more importantly, they can help minimize added stress on the already heavy workload expected of packaging.

Even for shoppers who have a specific brand or variety in mind, packaging will have a major influence on the ultimate choice. The ability to successfully stand out, be recognized and provide a compelling benefit when surrounded by similar items (regardless of physical or digital context) is the primary role packaging must achieve to minimize the friction between the shelf and basket.

Utilizing secondary panels of the pack (e.g., top, side, back) and/or linking messages to digital platforms outlined previously can help create a well-rounded story for consumers – allowing packaging to fulfill its System 1 responsibilities but also allowing easy access to sustainability credentials for those interested.

Here's to greener pastures.

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brand research

Putting the pieces together

How to use market intelligence to create an experience brand strategy

| By Paul Miser

snapshot

In this book excerpt, author Paul Miser explores a Lincoln Motor Company example to illustrate the value of assembling a comprehensive understanding of your brand's market.

At the time when Lincoln Motor Company approached us with a challenge, I had no idea the scale of disruption and transformation many industries were about to face. It was a time in business history where technology hit a point of adoption and efficacy to truly change behaviors and, ultimately, the way business was done.

At first glance, Lincoln's challenge seemed simple from an advertising point of view, "We need a new way to grow. Our industry is moving from manufacturing to mobility. Our business model is moving from ownership to membership. We need to prepare our brand and business for this evolution so we can capitalize on these trends." But as we dug deeper in uncovering the truth behind the request, we realized it was not exactly a small task but something that could determine the fate of not only an entire company but could set the stage for an entire industry, an entire movement.

If I knew one thing at the time, the answer to this challenge was not going to be as simple as an ad campaign. I knew that, if done correctly, it would require an end-to-end transformation of Lincoln's entire business, from vehicle decisions to service offerings to how it made money. In essence, it had to become an experience brand. With the challenge set, we embarked on a paradigm-shifting journey.

The journey started with understanding where Lincoln was as a brand and what its value proposition, purpose and vision were. At the time Lincoln had just gone through an entire brand-strategy refresh, so these refined elements were a great starting point to build from. Its brand and product point of view was all about delivering effortlessness to its customers. This brand strategy took on many forms, from how the products and features were designed to how the dealer experience was created, all the way through to the advertising and website experience. However, each touchpoint was geared toward communicating this value proposition only from a purchase and ownership perspective – not the entire consumer journey and not to answer the challenge request.

Throughout our discovery we found that this brand strategy provided a solid foundation to translate the necessary elements of an experience brand strategy. It gave us a filter to discern insights and opportunities for the customer and the brand experience.

Next, we wanted to intimately understand the issues and opportunities surrounding the trend elements outlined in its challenge, including manufacturing to mobility and ownership to membership. To establish a broad view of the situation we explored various elements in, around and adjacent to the brand and industry, as well as more tertiary trends happening in other, non-related industries. We looked at current owner and automotive driver sentiment. We tracked and modeled out customer behaviors as they relate to vehicle ownership and usage. We mapped the end-to-end mobility landscape from direct competitors, upcoming startups and transportation alternatives. We explored technology trends in, around and outside of the automotive and mobility industries to see what technologies and behaviors will and should be available to tap into.

With this exploration and discovery, we started to get a sense of macro trends that Lincoln, as a brand, could authentically start to connect and capture. This exploration gave us both the spatial understanding of what was happening in and around the brand as well as an element of time to ensure we were solving the right challenges at the right moment to ensure product-market fit.

To create the full experience brand strategy, we established a vision and the strategic tenets of how the Lincoln brand of effortlessness came to life in the future state of the trends we uncovered in discovery. This vision provided the blueprint for where the brand needed to go and the strategic tenets delivered the decision-making criteria to execute in order to reach that vision. Each element was designed to illustrate how the Lincoln brand would capitalize on the appropriate opportunity trends and how the consumer relationship would come to life at key moments, creating the symbiotic value exchange between the brand and the consumer.

Next, we built a series of personas that we could connect the experience brand strategy with, offering the right value at the right time. These personas were a spectrum of use cases from ownership to membership, from driving to riding and everything in between. These use cases gave us the insight and information to build holistic customer experience journeys to find the pain points, moments of joy and opportunities for the Lincoln brand to show up authentically and provide new or increased value to the customers.

These customer journeys were built in a progressive manner, showing the transformation from the current state of the brand-consumer relationship and then were modeled out in two-year increments over the course of 10 years. These customer journeys captured the gaps from stage to stage in persona growth, technology advancements, mobility trends and product and service development, to showcase what needs to happen in order to bring the Lincoln experience-brand strategy to life.

This progressive consumer journey mapping created the strategic roadmap to define all the things that had to be true in order to execute against the Lincoln experience-brand strategy at the right stage. In the end it created a list or backlog of projects that had to be completed at key milestones to move the consumer relationship and the brand forward.

By being able to document these projects on a timeline, we could prioritize the projects in a master strategic roadmap to deliver the experience brand correctly, over time, learning and optimizing along the way. The outcome of this exercise became the "Lincoln Way," an approach to the experience and lifestyle a consumer receives from being in a relationship with the Lincoln brand. Some of the tactical executions that were derived from this work were:

The Lincoln app: The app that connected the consumer and their preferences to the lifestyle of Lincoln, connecting them to the vehicle by being able to control key features like

Adapted with permission from "Digital Transformation: The Infinite Loop – Building Experience Brands For the Journey Economy," by Paul Miser (Paramount Market Publishing).

start/stop, climate control, location, etc.; connecting them to their local dealer through service and maintenance updates from the vehicle and the dealer; connecting them to support and lifestyle through on-touch interaction with their personal concierge.

Mobility offerings: To lean toward the effortlessness in driving, we partnered with and built mobility offerings that made getting from Point A to Point B more seamless. These offerings included finding parking from the app, location-based gas refueling and car-sharing when traveling.

Service offerings: We enabled a single point of contact through the Lincoln Concierge that went along with the owners everywhere they went from website to app to dealership, creating a singular relationship with each owner. We built dealer programs that took away pain points from service and maintenance including pickup and delivery for service, where the dealer would come and pick up the vehicle, leave an equivalent or better loaner and then deliver the vehicle once the service was complete, reducing the pain of going into the dealership.

Built a foundation

All of these offerings and more built a foundation for Lincoln in the mobility and membership space. By taking the consumer experience away from just the financial transaction moments like purchase, service and financing, Lincoln has been able to become more to its members and owners than ever before.

This robust example from Lincoln illustrates the steps needed to define and become an experience brand, from research to strategic development to customer journeys, into tactical execution of a strategic roadmap. Going through the steps for your brand is crucial to get a deeper sense of what the world looks like in and around your brand and your consumer. This insight gives you massive power to not only define your future and your potential but also the understanding of what you can do today to move your brand forward.

As outlined, experience brands are continuously evolving and growing based on consumer behavior and market opportunities, never a moment in the future. And, like the Lincoln example shows above, you can start right where you are by understanding your brand strategy and what it means to your consumers today. With your brand strategy ready, let's break down the steps to define your experience brand strategy.

Market intelligence. As in the Lincoln example, we gained as much intelligence as we could while we were establishing the experience brand strategy. Not only did we want to look at information in a moment in time but we also wanted to create the framework and approach to track and reflect over time. By establishing an ongoing market research approach, we were able to understand the trends, behaviors and opportunities that we could leverage to establish the experience brand strategy. To best understand the complexity of the opportunities for your brand, you will want to gain intelligence in, around and outside of your industry and your consumer set. With today's connected consumer, behaviors and expectations in a particular industry are affected by second- and third-level interactions, meaning that the experiences they have in one industry directly affect their expectations of another.

Direct insight. Looking at your current audience, competitors and industry as well as your organization can give you the information needed to understand the current opportunities for growth. Looking at consumer behavior trends, competitive action and technology trends will allow you to develop the insights needed to optimize your current offerings and find new avenues to create new value within the current environment.

Adjacent intelligence. The end benefit or value proposition your consumers receive may not be satisfied by your direct industry. They may be getting value from other industries around yours. For example, consumers don't have to own a car to get from one place to another. The rise of ride-hailing and car-sharing offers an opportunity for consumers to get the end benefit of transportation across different industries. The intelligence you can gather from dissecting your end-consumer benefit across other industries will give you more context to consumer behaviors and technology trends, letting you build and create new value propositions for your consumer.

Tertiary exploration. Tracking and defining more macro trends and consumer behaviors across non-direct industries can give you insight into how consumers are behaving and how technology is affecting their experiences. The experiences consumers are getting elsewhere have a direct effect on what they expect from the experiences they receive from you. If buying a mattress is now as simple as a single click, imagine what that can do to the expectations of renting an apartment or buying a car. This macro-view exploration will give you new insight into the trends and behaviors that will ultimately become expectation in your industry.

Ongoing tracking. Gaining market intelligence allows you to develop stronger decisions today. However, tracking this intelligence over time allows you to see emerging trends, consumer expectations, opportunities in the marketplace and understand how value is created for your consumers. This ongoing insight will help you move beyond the expectations of your current industry and the status quo growth and begin to chart your own course in creating new value over time.

Truly bring them to life

The strategic development for an experience brand takes your current brand purpose, promise, goals and objectives and expands them into the elements that truly bring them to life across the consumer journey. Using these elements as input for your experience brand strategy, you can begin to see how your brand could and should interact, how it converses with consumers, how relationships should be built over time, establishing trust, expectation and understanding. This level of experience strategy development gives you the clarity to define, develop and orchestrate the symbiotic value exchange needed to add massive value to your consumers while finding new revenue and increased efficiencies.

Paul Miser is CEO of growth strategy agency Chinatown Bureau. He can be reached at paul@chinatownbureau.com.

••• special advertising section

24 TOP QUALITATIVE RESEARCH COMPANIES

Qualitative research providers can offer many different but effective ways to gather the insights needed for your next research project. If you're looking to gain targeted, in-depth insight from consumers, qualitative research may be the route for you.

Whether you are seeking consumer insight for your product or service, looking to better understand certain consumer behavior or developing strategies to grow your business, these companies can provide all of the necessary channels to reach relevant audiences for in-depth feedback, including focus groups, interviews, ethnographies and more. With expertise in a variety of methods, the following companies can help you reach the right consumers to ensure you have access to the most appropriate audience for your research.

babbletype
Market Research Transcription

Babbletype

Founded 2009 | <100 employees
John Feldcamp, Angela Wood, Partners

Get what you pay for – serious qualitative research transcription. Have research audio and need content? Choose a firm that understands it. Babbletype is serious about HIPAA, GDPR, adverse-event training and reporting procedures and redacts personally identifying information by default. Our transcriptionists, translators and analysts are regularly graded for performance and trained to handle customized formats, instructions and

processes. We offer: full or clean verbatim, summarized, content analysis, tabular, master transcript consolidation, start-and-stop points, specialized capture, speech-to-written-form correction, non-verbal content capture, headings from guide, highlighting or tagging specified quotable content and high-level summary data reporting.

Phone 1-888-678-7782
babbletype.com/transcription

CarterJMRN K.K. Japan Market Resource Network

Founded 1989 | 80 employees
Dominic Carter, CEO

With offices in Tokyo, Osaka and Singapore, since 1989 CarterJMRN has helped major international brands across a wide range of industries (i.e., food and beverage, skin care, insurance, payment systems, destination tourism, airlines, health care and medical, automobiles and gaming and entertainment). With deep roots in specialist qualitative work, we lay the foundation for more detailed marketing activities in Japan with immersive qualitative and quantitative research approaches (i.e., cultural analysis, semiotics, desk research, depth interviews, ethnography, focus groups and quantitative survey methods). We are your guide to unmasking the needs, desires and opinions of Japanese consumers and helping you translate those into action. Please contact us at d.howard@the-carter-group.com to learn more!

Phone 81-3-6434-0520 (Japan); 1-512-913-8151 (U.S.)
www.carterjmrn.com

Civicom Marketing Research Services

Founded 2000 | 500+ worldwide employees
Annie McDannald, Global Vice President, Marketing Research Services

Civicom® Marketing Research Services is the global leader in facilitating web IDIs and focus groups worldwide. Our suite of services includes CCam™ focus, a portable HD 360° recording and streaming solution for live, in-person focus groups; Civicom ChatterBox™, an online bulletin board solution; ThoughtLight™, a mobile insights app for mobile qualitative research; and Glide Central®, a qualitative multimedia curation tool. In addition, we provide respondent recruiting, translations and transcriptions. Civicom is known among its clients for dedication to service quality and for the company's motto, "Your Project Success Is Our Number One Priority." Contact us at inquire@CivicomMRS.com.

Phone 1-203-413-2423
www.CivicomMRS.com

CRG Global

Founded 1987 | 200+ employees
Dennis Barbelet, Senior Vice President

Whether you need end-to-end qualitative solutions or assistance with a portion of your project, CRG Global is able to tailor its approach and partner with you to deliver the insights you seek. Our qualitative experts help you choose the right method and platform for your research objectives and budget. With test studios strategically located across the United States, global partnerships spanning decades and a long history of recruiting the most difficult-to-find groups, CRG is well-positioned to be your ideal qualitative research partner in both the U.S. and globally. Whether your project calls for an in-person or remote (online) approach, CRG has the ability and experience to be your trusted partner in executing industry-leading qualitative research.

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E-mail dennisbarbelet@crgglobalinc.com
www.crgglobalinc.com

Consumer Insights. Delivered.

Curion

Founded 2017 | 150+ employees
Sean Bisceglia, CEO

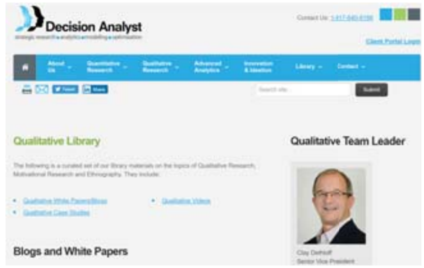
Curion provides world-class insights. From quantitative to qualitative research, we apply proven industry-leading, innovative methods to service over 65% of Global 100 companies. A full-service product and sensory insights firm, we work with clients to determine not what products consumers prefer but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

Phone 1-224-632-1919
curioninsights.com

Decision Analyst

Decision Analyst

Founded 1978 | 150 employees
Clay Dethloff, SVP Qualitative Research



Decision Analyst specializes in large, worldwide qualitative projects. The firm maintains a network of strategic qualitative partners across the U.S., Canada, Europe, Latin America, Japan, China, Korea and other Asian countries. Additionally, the company maintains a worldwide online panel of consumers who are self-aware and articulate, called the Articulators™. These individuals are ideal for online qualitative projects, providing both depth and breadth of understanding and insight. Decision Analyst's qualitative services include: in-person focus groups and depth interviews, webcam focus groups and depth interviews, time-extended online forums, online ethnographic studies, semiotic explorations, projective techniques, shop-alongs, usability investigations, video diaries and in-vehicle videos.

Phone 1-817-640-6166
www.decisionanalyst.com/qualitative/qualitative

Fieldwork

Founded 1980 | 250+ employees
Steve Raebel, President

Fieldwork has been a qualitative research partner for over 40 years. We recruit business, medical and consumer respondents according to client specifications and host in-person, remote and hybrid research sessions where clients uncover insights for brand and business impact. Our experienced recruiting professionals take pride in providing the highest-quality respondents. Over the years we have developed special techniques to reach audiences beyond our database. We do not believe in a one-size-fits-all approach to recruitment. Whether in our 15 state-of-the-art facilities or online, we match the desired experience to the study requirements. Focus on the research. We'll do the rest.

Phone 1-800-863-4353
www.fieldwork.com/market-research-services

Focus Insite

Founded 2016 | 27 employees
Jim Jacobs, CEO
Serenity Bohon, Director of Health Care Services

Focus Insite is a qualitative recruitment firm based just outside Philadelphia. Our slogan is "You supply the project, we supply the people!" Whether you are looking for doctors, nurses, patients or caregivers – call us. We have successfully recruited for a wide variety of medical projects encompassing all types of medical conditions and specialties. Our executives have come from the pharmaceutical industry. E-mail us first for your next project at bids@focusinsite.com.

Phone 1-888-836-2871 (888-8-FOCUS-1)
www.focusinsite.com

Fuel Cycle

Founded 2009 | 100+ employees
Eran Gilad, CEO

Fuel Cycle's award-winning Market Research Cloud is the most comprehensive intelligence-gathering ecosystem that exists today. Our platform enables decision makers to maintain constant connection with their customers, prospects and users to uncover real-world actionable intelligence. By integrating human insight with critical business data, and through automated quantitative and qualitative research solutions, Fuel Cycle's Market Research Cloud powers product innovation, brand intelligence and enhanced user experience. Staying relevant requires action. We built Fuel Cycle to ignite Action™.

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www.fuelcycle.com

Herron Associates, Inc.
Opinion and Marketing Research

Herron Associates Inc.

Founded 1958 | 20-25 employees
Sue McAdams, CEO

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Herron Associates is a leading provider of qualitative and quantitative research with niche experience in ethnically focused viewpoints and consumer food products. We offer in-person and online research with flexible service levels for end clients, consultants, full-service suppliers and independent moderators. We simplify the insight process by offering scalable research designs resulting in custom solutions to meet our clients' research objectives. We are powered by partnerships with experienced moderators and staff skilled in recruiting, survey creation and design, sampling, programming and reporting needed to quickly deliver results. Established in Tampa, Houston and Indianapolis, we are home to one of the nation's best test kitchens. Choose Herron to simplify your insights coast to coast.

Phone 1-800-392-3828
www.herron-research.com/what-we-do-1

Holden

Founded 2006 | 50 employees
Jeffrey Kelsch, Managing Partner

Consider Holden your "team on the ground" in Asia! With over 15-years' experience conducting research projects around the Asian region, Holden offers a unique and high-quality solution to your Asian market research needs. Holden has experienced, full-service research teams in China, Japan, Korea and every major Asian market. We know what works in the various markets of Asia and are happy to share our expertise to ensure the success of your project. We can run both qualitative and quantitative research works and support our clients on any aspect of the research process – including design, setup, sampling, project management, recruitment, moderation and analysis. We are here to support your efforts to understand the increasingly sophisticated and ever-evolving Asian consumer.

Phone 1-208-809-7117 (U.S.)
www.holdendata.com

InsightsNow

Founded in 2003 | 35+ employees
Dr. David Lundahl, CEO and Founder

InsightsNow is a full-service, award-winning behavioral research firm that partners with companies across a wide array of industry verticals to accelerate business decisions. We specialize in supporting companies' creation of disruptive innovations for achieving a cleaner, healthier, happier world. Using proprietary and unique behavioral research approaches, we work with clients to discover creative, collaborative and innovative insights. The team has a passion for discovering people's beliefs, behaviors, triggers, cues and motivations to help identify unexpected human truths that inform and inspire. Through implicit testing applications such as our Implicit/Explicit Test™, custom research solutions or assisted DIY tools, we help find answers faster – improving speed-to and success-in market. By partnering with InsightsNow, clients can delve into the "why" behind human behavior and design research to address challenges and accelerate innovation by focusing on consumer behaviors and emotional drivers. Visit our website to learn more.

Phone 1-541-757-1404
www.insightsnow.com

Ironwood Insights Group LLC

Founded 2017 | 300 employees
Mary Lea Quick, VP Client Services/Qualitative

Ironwood Insights Group leads the market research industry by offering a seamless combination of all research methodologies into one point of service. Our team provides strategically designed research plans to help our clients achieve their goals. Our qualitative methodologies include traditional focus groups, online focus groups, online bulletin boards and in-depth interviews. We provide research design, internal recruiting, moderating and report writing. In addition, we offer quantitative consultation, questionnaire design, sample sourcing, survey fielding, data analysis and reporting. Our qualitative and quantitative methodologies enhance one another as a combined solution or can be provided as standalone services. Call or e-mail today for "Insights that provide clarity and drive action."

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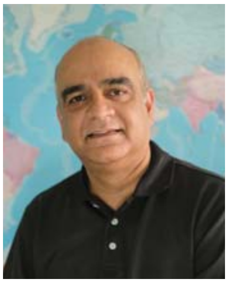
E-mail info@ironwoodinsights.com
www.ironwoodinsights.com

Issues and Answers Network Inc.

Founded 1988 | 400+ employees
Mohit Gour, EVP



Issues & Answers Network Inc. is a full-service global market research firm headquartered in coastal Virginia. After 33 years of experience, I&A has expanded research in over 60 countries, conducted over 19,000 projects and served clients in more than 10 different industries. We are dedicated to making our clients competitive in the digital age. Our experienced project managers will help customize your local or global research needs from start to finish. Our global qualitative services include recruitment, virtual focus groups, digital ethnographies/discussion boards, digital IHUT, online IDIs, dyads and triads. Additional services include in-country moderation, simultaneous translations and English transcripts.

Phone 1-757-456-1100
www.issans.com

Just The Facts Inc.

Founded 1994
Bruce Tincknell, Managing Director

We listen to your customers! Qualitative dives into individuals' thoughts, emotions and perspectives, providing key insights to uncover how people really react. Our unique "Qual-Quant™" process leverages the best of the qual and quant worlds to yield rich insights beyond just numbers. Our proprietary process opens up B2C and B2B customers' motivating actions, behaviors and decision-making. Our toolkit uses an array of online, tech-savvy methods from focus discussion sessions, IDIs, digital shop-alongs and bulletin boards, plus professional, unbiased leading of corporate in-house meetings and creative workshops for achieving actionable results. This investment leads to guiding optimal business strategies and achieving stronger sales, profits and ROI. Let's discuss your specific needs, ensuring your initiatives are ready for market. Call today for a no-obligation consultation or e-mail info@jtfacts.com!

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Krämer Marktforschung GmbH

Founded 1986 | 51 employees
Michael Krämer, Managing Director
Markus Albrecht, Managing Director
Christoph Rogl, Managing Director

Krämer Marktforschung GmbH, ISO 20252-certified, is one of the leading German data collection institutes for qualitative market research since 1986. With our professional recruiting staff, we manage to reach your respondents for your requested screening criteria for B2B as well as for B2C to provide you with the most meaningful insights for your project. Our teams of experienced moderators and interviewers ensure a smooth project flow for group discussions or one-to-one interviews either in our fully equipped studio facilities in Berlin, Frankfurt, Hamburg, Muenster and Munich or external locations. Krämer – The most trusted partner in MR data collection.

Phone 49-2501-802-118
www.kraemer-germany.com

Murray Hill National

Founded 2013 | 35 employees
Susan Owens, COO

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

Phone 1-972-707-7645
www.murrayhillnational.com

Precision Research Inc.

Founded 1959 | 25-49 employees
Scott Adleman, President

Precision has been hosting and recruiting for qualitative research for more than 30 years. Our Chicago facility features four rooms in a variety of layouts: living room-style, conference room, UX/UI and audience-style. Our largest room can accommodate large product displays (hospital beds, 20 appliances, lawn mowers, snowblowers or four cars). You name it and we have probably done it. Plus, we have a commercial test kitchen for food testing. We recruit nationally to partner facilities and hotels. Our proprietary respondent panel runs on our best-in-class recruiting system to efficiently identify, schedule, confirm, remind and pay respondents. Our process delivers highly accurate recruiting quickly and affordably. Of course, we have all the tech you need: ultra-high-speed internet, HD video recording and streaming.

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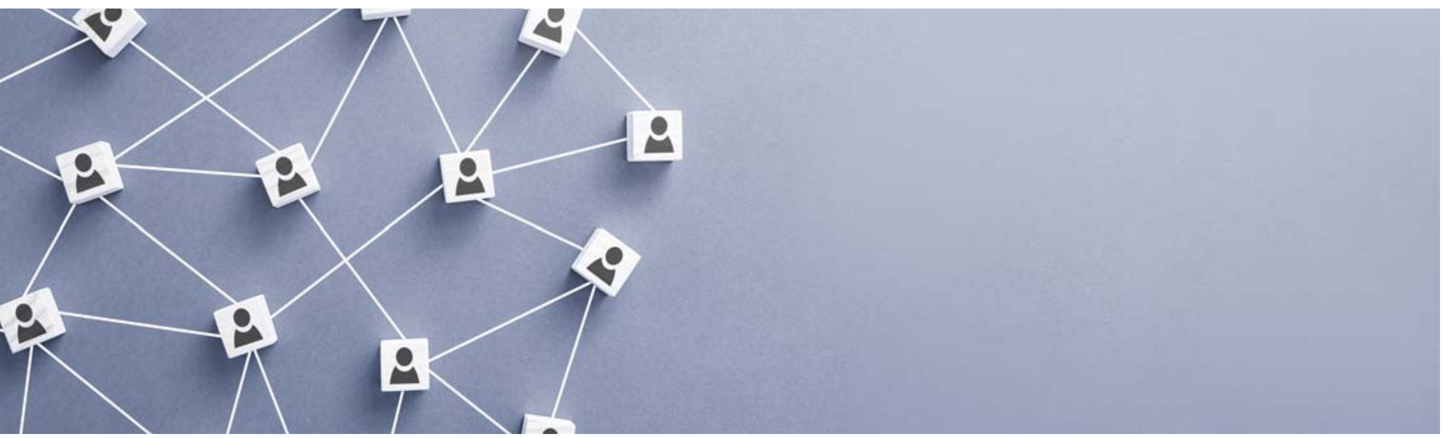
RFQ Quotes@preres.com
www.preres.com



Recollective

Founded 1998 | 50+ employees
Stephen Thompson, Chief Operating Officer

Recollective is an industry-leading research tool for conducting online qualitative studies and developing robust insight communities. Available on mobile and desktop in 25+ languages, Recollective makes it easy to conduct custom online qualitative research for any duration or project size, anywhere in the world. Design engaging studies using a combination of asynchronous activities, journals or discussion forums, plus live video focus groups and video IDIs. Asynchronous activities combine various interactive question types including open text, media uploads, image and video markup, card sorting, fill-in-the-blanks, quick polls, grids and more. Licenses are available from three days through to ongoing annual communities.

Phone 1-613-686-1909
www.recollective.com

Research America

Founded 1985 | 300 employees
Robert Porter, CEO

Research America is an agile, full-service and field marketing research firm. Our team of well-trained qualitative researchers with broad expertise across a variety of industries can help you choose the optimal approach for your marketing research project. We have experienced researchers in all types of qualitative market research, as well as dedicated focus groups and central location testing facilities. Our experts will find the most qualified people to participate in your study and provide expertise in strategic consulting, health and sustainability, customer experience, brand research, data collection and recruiting. Our focus groups and facilities include biometrics, CLT, HUT and full-kitchen testing. Contact us today to discuss your qualitative research needs.

Phone 1-610-356-1800
www.ResearchAmericaInc.com

Schlesinger Group

Founded 1966 | 1,200 employees
Laura Livers, EVP Qualitative Solutions

Schlesinger Group is the world's most comprehensive provider of data collection and market research services, offering a broad range of qualitative solutions to support your research in person and online. Flexible platforms: we provide industry-leading platforms for online discussions, virtual focus groups and IDIs, mobile ethnographies and more. World-class facilities: access a global network of high-specification facilities, strategically located in key markets across the U.S. and Europe. Intelligent recruitment: clients trust us to deliver high-quality respondent sourcing for their projects. No matter the approach, Schlesinger Group makes it easy to deliver compelling insights that drive understanding and bolder decisions. Contact qual@schlesinger-group.com.

Phone 1-678-298-9230
SchlesingerGroup.com

Shapiro+Raj

Founded 1955 | 80 employees
Zain Raj, CEO

Shapiro+Raj's rich history in qualitative research started over 60 years ago when we invented methodologies that replaced poll-oriented research based on social and behavioral sciences. In 2020, we were voted No. 2 for qualitative research excellence and placed in the Top 15 for most innovative research agencies in the GRIT report. We have completed qualitative research for clients in a diverse set of industries including pharma and health care, retail/grocery, home improvement, CPG and services. Our team of social scientists, strategists and data analysts leverage innovative methods, a premier tech stack and human insight to spark transformative outcomes for your brand.

Phone 1-312-898-4439
www.shapiroraj.com

Toluna

Founded 2000 | 1,400 employees
Frédéric-Charles Petit, CEO

Toluna delivers real-time consumer insights at the speed of the on-demand economy. By combining global scale and local expertise with innovative technology and award-winning research design, we help clients explore tomorrow, now. Toluna is the parent company of Harris Interactive Europe and KuRunData. Together, we strive to push the field of market research toward a better tomorrow. Toluna Start: a single source for all of your consumer insights. Toluna Start is an end-to-end SaaS-based consumer intelligence platform. With a single log-in users can conduct quantitative and qualitative research – either through self-service solutions or through custom research programs built with the help of research and service experts.

Phone 1-203-834-8585
www.tolunacorporate.com

Verve

Founded 2008 | 100+ employees
Andrew Cooper, Founder and CEO

Verve are experts in community panels and smart digital research; vividly communicated. We're customer-obsessed and passionate about putting the customer at the heart of our clients' businesses – empowering better decision-making. We specialize in pop-up and long-term communities, delivering in-depth consumer understanding and elevating the communication of insight. We help the likes of Samsung, Barclays and Walgreens Boots Alliance understand their customers and create better products, experiences and communications. We are always-on, lean-in, front-of-our-seat type people – we do great research with all the urgency and commitment it deserves to help empower our clients and their customers. Let us energize your insights, your customers and your business!

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www.addverve.com

CALENDAR OF EVENTS

••• can't-miss activities

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

Corinium Global Intelligence will hold its Business of Data Festival on **July 20-22** as digitally broadcast event. Visit bit.ly/2RRFwyq.

Corinium Global Intelligence will hold its Chief Data and Analytics Officers – Government Live event on **July 20-21** as a virtual summit. Visit bit.ly/35iSFDP.

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

Corinium Global Intelligence will hold its event Data Champions Online – Financial Services, U.S. on **August 17-18** as a virtual event. Visit dco-fs.coriniumintelligence.com.

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

Quirk's Media will host Webinar Wednesday on **August 25**. Visit quirks.com/events/webinar-wednesday-8-25-21.

The American Association of Advertising Agencies (AAAA) will hold its StratFest 2021 as a virtual event on **September 14**. Visit www.aaaa.org/event/4as-strategy-festival-2021.

IQPC will hold its CX Exchange Retail as a virtual event on **September 14-15**. Visit bit.ly/3iBIJNH.

Quirk's Media will host Webinar Wednesday on **September 15**. Visit quirks.com/events/webinar-wednesday-9-15-21.

The 2021 Quirk's Event – Chicago will be held on **September 30 – October 1** at the Hyatt Chicago in **Chicago**. Visit www.thequirksevent.com.

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

Corinium Global Intelligence will hold its Chief Data and Analytics Officer – Fall event on **October 12-14** as a virtual event. Visit bit.ly/3vo71NC.

The Mystery Shopping Providers Association (MSPA) will hold its CXE3 2021 event on **October 12-14** at the We-Ko-Pa Casino in **Fountain Hills, Ariz.** Visit bit.ly/3wozkgs.

The 2021 Quirk's Event – London will be held on **October 13-14** at the InterContinental London 02 in **London**. Visit www.thequirksevent.com.

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.

IQPC will hold its Customer Contact Week Nashville on **October 20-22** at the Grand Hyatt in **Nashville**. Visit bit.ly/3gkvjEc.

Informa will hold its Marketing Analytics and Data Science Conference on **October 25-26** at Eau Palm Beach Resort and Spa in **Manalapan, Fla**. Visit informaconnect.com/marketing-analytics-data-science.

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.

The World Association for Public Opinion Research (WAPOR) will hold its 74th Annual Conference on **November 2-6** as a virtual event. Visit wapor.org/events/annual-conference/current-conference.

The Strategy Institute will hold its 2021 Customer Experience Strategies Summit on **November 9-10** as a virtual event. Visit www.customerexperiencecanada.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.

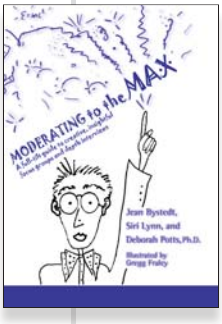
The Insights Association will hold CONVERGE 2021 on **December 7-8**. Visit www.insightsassociation.org/conference/converge-2021.

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

Event details as of June 14, 2021. Please see websites for more details.

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

ESSENTIAL READING FOR RESEARCH PROFESSIONALS

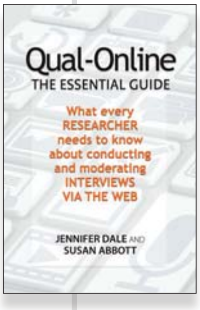


Moderating to the Max

A Full-Tilt Guide to Creative, Insightful Focus Groups and Depth Interviews

Detailed instructions for more than 20 techniques that will deepen focus group findings and bring life to a fading group. From perceptual mapping to personification, you will never again have to guess whether a technique is the right one for the occasion. Full of examples and illustrations, the book's emphasis is on "play": how fun exercises can inspire focus group respondents to reveal deeper motivations.

160 pages, 7x10, 978-0-9830436-2-1 $34.95 paper

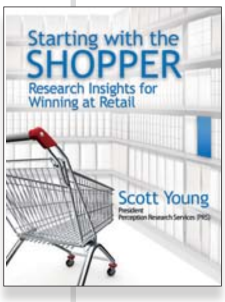


Qual-Online: The Essential Guide

What Every Researcher Needs to Know about Conducting and Moderating Interviews via the Web

From the types of tools at your disposal to planning your first online study, this extensive guide will help you understand the sequence of steps to follow, timing, and costs involved and help you manage all of the useful insights you will gather—making your job of sharing information with your client that much easier and your reports more robust. *The* must-have guidebook.

216 pages, 6x9, 978-1-941688-26-7 $29.95 paper



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Research Insights for Winning at Retail

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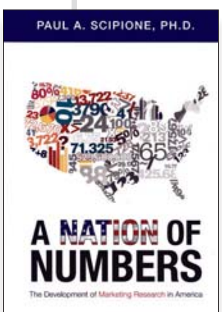
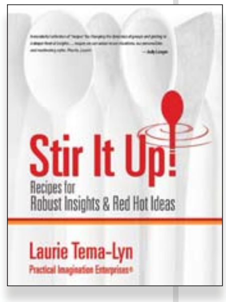


A Nation of Numbers

The Development of Marketing Research in America

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

546 pages, 7x10, 978-0-9852482-2-2 $49.95 cloth



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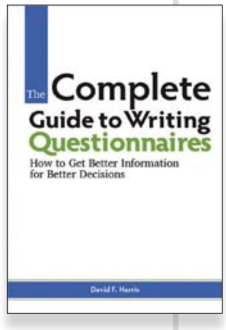

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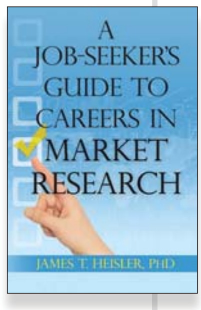

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10 minutes with...

Shefali Khanna

Manager, Consumer Insights, Brookfield Properties

"We had to adapt to more agile approaches and really make sure our insights were highly actionable in the current situation to each audience."

What led you to a career in research and insights?

I started off college at the University of Illinois at Urbana-Champaign in a major unrelated to research. A few months in, I didn't feel that it was the right fit for me and I dropped out of my major. Undecided, I started taking – and crashing! – classes in a variety of subjects to see what interested me. I took an economics course and it felt relevant to me, and I could connect the dots between what I learned in the classroom and what I saw in the outside world. Combined with having a more generalist mind-set, this ultimately led to my first job at Ipsos, where I could apply my social science background along with my diverse interests to tackle business challenges.

The COVID-19 pandemic has forced everyone to pivot. What has been the most challenging shift for you and your team?

Prior to COVID-19, we did a considerable amount of in-person research. This was everything from ethnography to shopper intercepts at properties, observational research during market tours, IDIs and focus groups, you name it! And suddenly, all of the tools either had to shift to digital methods or be paused in the interim. We had to adapt to more agile approaches and really make sure our insights were highly actionable in the current situation to each audience.

Could you share tips for researchers who are struggling to engage with key stakeholders?

Since the pandemic started, I have made it a part of the standard research process to conduct stakeholder interviews at the beginning of a project. I identify a variety of stakeholders – those who are both the end receiver of the insights, as well as other cross-functional members who will benefit from the research, even if it's not directly applicable. This helps to make them feel more involved in the outcome and also helps keep our team more top-of-mind if they do have other business questions in the future. I also schedule check-in meetings periodically throughout the year so that the lines of communication remain open.

Do you see yourself leveraging any new methodologies or tools in the next year?

It's a passion of mine to try out new tools, so definitely on the radar! We have recently onboarded with a multi-method qualitative platform that we are excited to use and hope to continue to use in the future for a variety of business questions. We are doing more ideations as well, so using tools that can help with remote or hybrid ideation. As we look to continue to use insights for innovation, we expect to expand our UX research capabilities as well for new products, tech and services. We are also exploring tools that leverage AI and neuroscience capabilities, to get a different layer of insights beyond traditional methods and hope to implement soon.

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