QUIRK'S

For marketing research and insights professionals

LITTLE THINGS MEAN A LOT

MEASURING AND MANAGING CUSTOMER DELIGHT

PLUS

The role of emotion in CX

Merging design thinking and insights communities

A portfolio approach to CX intelligence

Also Inside

THE Q REPORT 2021

Quirk's Marketing Research Review
September/October 2021
Volume XXXV Number 5
www.quirks.com

Matt (CRO)
"Sue, how come Isaac has the inside cover?
What about my 'awesome quant capabilities' ad?"

Sue (CMO)
"He said it was your idea."

CONTENTS

Quirk's Marketing Research Review
September/October 2021 • Vol. XXXV No. 5

page 32
page 44
page 64
page 56
page 93
page 24
page 76

DEPARTMENTS

ON THE COVER

FEATURES

COLUMNS

Quirks Marketing Research Review
4662 Slater Road | Eagan, MN 55122
651-379-6200 | www.quirks.com

Publisher • Steve Quirk
steve@quirks.com | x202

Editor • Joseph Rydholm
joe@quirks.com | x204

Digital Content Editor • Emily Koenig
emilyk@quirks.com | x210

News Editor • Sarah Freske
sarah@quirks.com | x212

Audience Development • Ralene Miller
ralene@quirks.com | x201

Directory Sales • Ilana Benusa
ilana@quirks.com | x213

V.P. Sales • Evan Tweed
evan@quirks.com | x205

Sales • Tammy Job
tammy@quirks.com | x211

European Sales • Stewart Tippler
stewart@quirks.com | +44(0)7989-422937

•••moving? make sure Quirk's comes with you!
Send change of address information to subscribe@quirks.com

New: Download the Quirk's iPad or iPhone app to view this issue.

An interactive downloadable PDF copy of this magazine is available at www.quirks.com/pdf/201103_quirks.pdf.

Follow us on Twitter @QuirksMR.

CLICK WITH QUIRK'S

••• online, e-newsletter and blog highlights

••• events

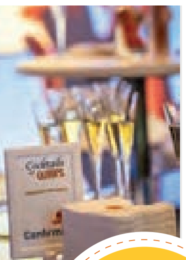
Back in person! The Quirk's Events

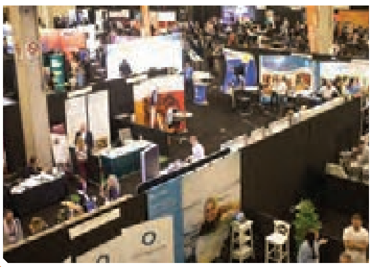
Cutting-edge sessions, innovative exhibitors and great networking – at a price you can afford! Choose the date and location that works for you.

- Chicago – Sept. 30 - Oct. 1
- London – Oct. 13-14
- New York – Nov. 2-3

Here are just a few of the companies that will be speaking at the events: Tyson • Advocate Aurora Health • Johnsonville • American Family Insurance • Burt's Bees • Mars Wrigley • Ulta Beauty • The J.M. Smucker Company • Hormel Foods • Active Gloucestershire • Microsoft • J.P. Morgan

To learn more or register for the events, visit www.TheQuirksEvent.com.





// E-newsworthy

Collaborative intelligence: A marketing research podcast sharing industry knowledge

https://bit.ly/3xzWlN9

Consumer loyalty and shopper behaviors post-COVID

https://bit.ly/2XfKs2x

Becoming agile: Data analytics is vital as PR, marcom align with C-suite goals

https://bit.ly/3lPPNYw

// Noted Posts

Quirk's Blog

The return to in-person learning sparks back-to-school shopping
https://bit.ly/3s76Y9d

After the pandemic: E-commerce, subscriptions and services
https://bit.ly/2XaEkZc

Looking ahead: COVID-19: Survey Monitor
https://bit.ly/2VMEOV9

Research Industry Voices

Understanding consumers with modern segmentation techniques
https://bit.ly/3AAzmUc

Hello, rebrand. Is it too little too late for Victoria's Secret?
https://bit.ly/3yE5UvJ

Risks around gatherings: How social preferences have changed
https://bit.ly/3CBX43Z

Research Careers Blog

Making the case for the return to in-person
https://bit.ly/3yHlgQg

How a zero-sum mind-set can undermine workplace negotiations
https://bit.ly/3s4yvbn

Engaging employees as brand ambassadors
https://bit.ly/37DYZGZ


Discover More
Meet the growing challenges of testing products and collecting actionable data in an ever more complex, consumer-driven world.
UX and Neuro Technology Made Simple
UX Testing
Facial Coding
Eye Tracking
Biometrics
Integrated Labs
Videography
Video Editing
IVP research labs
Discover More at IVPResearchLabs.com

••• pet care research

Portrait of a pandemic pet adopter

As people settled into working from home with their newly adopted pets during COVID-19, dog control products – such as bark control, harnesses and gentle leads – saw a 113% increase in sales compared to pre-COVID, according to a survey conducted by digital media and promotions technology company Quotient.

The survey showed that of the people who adopted pets during the pandemic, 52% were male and 48% were female. Furthermore, the survey revealed that Millennials (aged 24-42) were the most likely to adopt during the pandemic, with 43% contributing to the fur-baby boom. While Millennials mainly adopted pets for children/other family members who had been wanting one (40%), 32% of Gen Z (aged 18-23) adopted a pet to boost their mental health.

When asked where they usually shop for their dog and/or cat, pet superstores received the greatest number of responses (48%). Of Baby Boomers (aged 55-73), 39% shop at pet superstores the most but they also enjoy the shopping experience that big-box retailers provide (31%). Millennials preferred local, boutique pet stores (24%) more than any other generation.

••• employee research

HR's got my back

Eighty-three percent of workers surveyed say they trust their human resources (HR) manager or department to protect their interests, according to a survey of 1,000 full-time workers in a range of industries conducted by tech firm Elements Global Services.

However, a few industries have not established such trust consistently. Around 50% of people working in media and 69% working in hospitality say they don't trust HR. Additionally, entry-level female employees are the least likely to say they trust HR to protect their interests (68%), versus everyone else (79%). On the other hand, entry-level male workers (83%) have a nearly equal expectation that their interests will be protected as do senior-level women (84%).

While a majority of people say they trust HR, that doesn't mean they find HR effective or that they don't harbor other concerns when they consider making formal complaints. Two-thirds of workers say they've neglected to report something to HR because they didn't think HR would fix the issue. The most frequently cited problems were: having too much work, a personality clash and bullying.

A reluctance to make reports is not just about the specific nature of the issue or the employee assuming that HR won't act. There's also a fear of retaliation to contend with – 49% of workers who have neglected to report something cited this fear.


DON'T SWEAT IT.
LET US DO THE HEAVY LIFTING.
Survey Design & Consultation · Recruitment
Programming · Advanced Methodologies
Op4G is a leading research provider with unique recruitment methods and a veteran team ready to meet even the toughest research needs.
Op4G | www.Op4G.com | @Opinions4Good

By Joseph Rydholm, Quirk's Editor

Researchers, stay on your toes

Joe Rydholm can be reached at joe@quirks.com

Among the many themes to emerge from our annual Q Report survey of client-side researchers (covered in great depth elsewhere in this issue), one that jumped out at me this year was agility. I don't mean agile research, though there were certainly mentions of that in the responses to the many open-ended questions we posed to our audience of insight workers. I mean the ability to move and react quickly as the situation warrants.

Over the course of the pandemic, researchers have already shown admirable élan in responding to the crush of (in some cases newfound) attention visited upon their departments by desperate internal clients trying to make sense of the virus's multitude of impacts. Based on the responses we received this summer, things haven't slowed down at all. In fact, it seems like a host of other factors are working in concert with the continuing effects of COVID-19 to impact researchers' lives and force them to adapt on-the-fly.

The need to learn something new. From brushing up on qual-related abilities like effective presentation skills and storytelling to diving into number-crunching to make sense of all the new, non-research-generated data they now have access to, many respondents cited the need to expand their capabilities – for their own professional benefit and that of their company.

> *"Learning R and Python programming for data analytics to marry customer data with survey data to gain a richer understanding of the consumer."*
>
> *"Use of new research and reporting tools to leverage current responsibilities and serve the stakeholders at my organization."*
>
> *"Gaining hands-on experience using new insight technology tools so when the opportunity comes to evaluate purchases I am aware of what the market offers."*
>
> *"Continuing to explore agile and remote methodologies; continuing to evolve and trying to keep up with changing/improving research technology."*

The need to react to internal changes. Though organizational overhauls are nothing new, many readers said their firms were going through a variety of shifts and disruptions, from centralizing insights into a single point of contact to wholesale revamps driven by management shakeups. No matter the causes, researchers know their ability to roll with the punches is key.

> *"Company just underwent massive re-org; new teams being created, new relationships/partnerships forming."*
>
> *"We are pivoting to a more programmatic approach and integrating tools and platforms that support enterprise-wide VOC activities in a more holistic way (e.g., win-loss analysis, community panels)."*
>
> *"Lots of restructuring of our insights organization; greater focus on customer experience versus operational insights."*
>
> *"Adapting to economic impact of pandemic (reduced budgets) and trying to develop a better understanding of changing impacts on different customer audiences."*

The need to battle perceptions. At the same time as they are evolving their skill sets and reacting to internal changes, they also have to contend with shifting views of the insights function, both internally and in business at large. They realize they can control some of the perceptions by continually delivering strategic value to their organizations but at a certain point preconceptions may be hard to overcome.

> *"I think on some level execs understand it is important but there is a lack of awareness of what insights can provide to an org. Also, insight work has to be done well to be viewed as legitimate and valuable."*
>
> *"It feels like we are having a moment probably because so much has changed, entities are hungry for new perspectives and an understanding of the 'new normal' (ugh that phrase!)."*
>
> *"Insight is valued but research is not. Finding ways to get to insight without spending money on research is the biggest challenge in my current role."*
>
> *"I think we will continue to become a more important part of the overall product development process, being brought in earlier and earlier in the cycle. We will be looked at to provide more insights, guidance and strategic recommendations. Maybe someday we will even get control of our entire budget."*

Wouldn't that be nice?

IN FOCUS

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

Q // Survey Monitor

••• technology research

Shopping out loud

Voice-assistant tech use spreading

As the popularity of voice-assistant technology continues to rise, so does its expanded usefulness in guiding consumers from awareness to purchase. The Voice Consumer Index released by Vixen Labs reveals how different sectors might leverage the technology, which is now used by a majority of people, with a third using it every day.

With Apple's Siri initially launching in 2011, Google's Voice Search in 2012 and Amazon's Alexa launching in 2013, voice technology has long moved on from the early adopter stage, with 34% of U.K. consumers using voice assistants daily, followed by 31% in Germany and 30% for the U.S. Usage is spread across all age groups as well, showing that the opportunity to use voice-assistant technology is not just for brands with a younger audience.

When it comes to user attitudes toward voice-assistant tech, privacy is a concern across all three regions but not a barrier to active users. In the U.K., 51% say that using a voice assistant to search is quicker than text, and about half (51% U.S., 52% U.K., 50% Germany) across all regions are interested in how voice technology will develop in the future. However, non-users do cite privacy and trust as the main barriers to usage, along with feeling self-conscious about using voice-assistant tech.

When analyzing the reasons why people use voice assistants, it's clear that behaviors align with the marketing funnel. Users move from awareness (80% search about products) to purchase and retention (41% of users have made a purchase through voice). Across all three regions, voice-assistant tech is most often used at home, either on a phone or a smart speaker. Users in the U.S. are the most likely to use this tech outside of their homes, with 18% using it in the car (vs. 8% U.K., 9% Germany) and 12% using it in the office/at work (vs. 6% U.K., 9% Germany).

Thirty-seven percent of people in the U.S. reported conducting searches on their smartphone using their voice, while 27% indicated they were likely to use voice to search on their desktop or laptop and 24% said the same for their smart speaker. The research also found that, after the initial search, users were likely to continue their information-seeking on a product's website (82% U.S., 81% U.K., 77% Germany). Many were also interested in going to a brand's mobile app or YouTube to learn more about the product.

Audiences across the U.K., U.S. and Germany were asked about their top-priority voice-assisted tasks across different industries. In banking and finance, an average of 32% across the 6,000 people surveyed identified "check my bank balance" as their top priority. Results showed small differences in behavior between the three countries: 21% of U.S. consumers said "pay a bill" is their top banking and finance voice-assisted task, compared to 15% in the U.K. and 17% in Germany. This likelihood switches in other areas: German users are more open to using the technology to find a doctor or specialist than those from the U.S. or U.K.

The study was conducted by Delineate from May 14-19, 2021, and surveyed 6,000 respondents ages 18 and older (2,000 each in the U.S., the U.K. and Germany).

••• financial research

Spending for the moment

Study examines Gen Z financial habits

From generation to generation, key events can change the way that people handle their finances. To better understand how Gen Z manages their financial lives, Logica Research explored the financial habits of this cohort – specifically those aged 16-24 years old – in a recent Future of Money study.

Although 37% of Gen Z is still using cash today, this is anticipated to decline as only 22% say they will pay with cash in person in the future. In-person debit (35% to 26%) and credit card (16% to 14%) usage is also expected to decline, while use of payment apps will rise from 5% today to 19% for in-person payments. Peer-to-peer payment forms such as Venmo are on the rise among this group and Gen Z's use of buy-now-pay-later options has also jumped from 15% to 22% since the onset of the pandemic. Coupled with the anticipated lower use of credit cards, data suggests that Gen Z will be looking for alternative ways to use credit.

Gen Z is juggling different income sources, with 46% having side hustles. Results suggest that multiple income streams and managing expenses creates some stress. Over two-thirds (67%) of Gen Z are stressed about their financial situation, while 16% report that they do not have enough to cover their monthly expenses. Based on qualitative interviews, this generation is focused on generating income and saving for short-term needs, while also looking toward the future and retirement.

Twenty-two percent of Gen Z are investing more in the stock market than they were before the pandemic. The study found that they are using investing differently from other generations – primarily for short-term gains and an alternative income source. While only 9% of Gen Z currently owns cryptocurrency, a full 54% plan to invest in crypto in the next five years.

Members of Gen Z want to manage their money well and look to multiple sources for advice. Gen Z is most likely to turn to friends and colleagues for financial advice (31% vs. 15% for Millennials and 17% for Gen X and Boomers), but they also look to financial institutions (21%) and financial advisors (20%). More than any other generation, they are seeking financial tools to build wealth from financial institutions. This generation sees newer tools as a convenient way to address needs, while more traditional providers are seen as trustworthy.

The Logica Research Future of Money Study was conducted online among 1,000 U.S. adults and an augment of 200 older Gen Zers (16-24 years old). The study was conducted April 8-14, 2021.

••• health care research

Understanding priorities

Study highlights desired outcomes of substance use treatment

When it comes to treating substance use challenges, understanding the desired outcomes of treatment programs is critical to success. In order to better understand treatment priorities for individuals and families, Community Catalyst, Faces and Voices of Recovery and the American Society of Addiction Medicine joined forces and gathered 721 responses from individuals and 445 responses from families to identify the most important treatment outcomes. Staying alive topped the list, followed by improving quality of life, reducing harmful substance use, improving mental health, meeting basic needs, increasing self-confidence/self-efficacy and increasing connection to services and support.

Treatment priorities differed somewhat based on race/ethnicity, with the top five outcomes taking different levels of important and sometimes slipping below an individual's top five desired outcomes. While the difference exists, the study notes that due to the small sample size further study is needed to verify demographic differences. However, according to the study, 35% of Black/African American respondents said "address issues that come up in daily life" was most important compared to 20% of white respondents and 14% of Hispanic/Latino respondents.

Among 25% of white respondents, "stop all drug and alcohol use" was the most important outcome compared to 13% of multiracial respondents. Additionally, this was not a top outcome for any other group. Thirty percent of white respondents also prioritized quality of life, compared to 14% of Black/African American respondents. "Stay alive" was the top outcome across white, Black/African American and Hispanic/Latino respondents, but fell in second for multiracial respondents behind "have improved quality of life."

There were also several outcomes that made the top five in the analysis by race/ethnicity that were not reflected in the top five of the overall sample. These include "take care of my basic needs," which was third-highest among Black/African American respondents and fourth-highest among Hispanic/Latino respondents; "feel safe in my surroundings," which was third-highest among Hispanic/Latino respondents; and "develop a recovery support system," which was fifth-highest among multiracial respondents.

Thought the study points out that more research is needed, analysis of the results did not show significant differences in priorities across socioeconomic status. However, some differences did appear across gender. The top five outcomes overall appear in different priority order by gender and some new outcomes rise to the top, including "take care of my basic needs" for 18% of men responding. Among transgender/nonbinary respondents, 35% selected "develop a recovery support system" and 29% selected "increase housing stability" – though the study notes a small sample size of 17 for this group.

When asked whether their top five priorities changed during the COVID-19 pandemic, 80% of respondents said that their top outcomes for treatments had not changed. Of the 20% who chose different results during COVID-19, new priorities included feeling safe in their surroundings, staying alive, improving mental health, increasing connection to recovery supports and taking care of their basic needs.

The study also asked respondents to identify priority outcomes for their family members with substance use challenges. These 445 respondents included some people with substance use challenges themselves and some without. Family members chose similar top five priorities as individuals who reported for themselves but ranked these in a slightly different order. First was "stay alive," followed by "improve mental health," "have improved quality of life," "stop all drug/alcohol use" and "address issues that come up in daily life."

In focus groups conducted with 53 participants, the research team delved into ways in which treatment services should be changed. Participants prioritized the increased availability of services, especially peer support services and other community services provided by Recovery Community Organizations. Additionally, participants wanted more treatment options that are separate from the criminal justice system in order to provide more options for people to find treatment willingly.

Participants also recommended making treatment and services more affordable and removing barriers to insurance. Bridging treatment gaps was also highlighted in order to expand care coordination so people can more easily access continuous treatment and services when they need it. During the focus group, the need to have individualized treatment approaches was brought up. Participants said that treatment needs to "meet people where they're at" and follow harm-reduction approaches.

Finally, focus group participants noted that trauma is at the core of many people's substance use and that providing trauma-informed and culturally effective services would achieve better outcomes.

The study was conducted by Community Catalyst, Faces and Voices of Recovery and the American Society of Addiction Medicine and surveyed 839 respondents with "lived experience with substance use challenges, including addiction" across the U.S. Nine focus groups were co-facilitated by Community Catalyst and Faces & Voices of Recovery and involved 52 participants.

••• employment research

Biding time

Job seekers lack the same urgency as employers

It only takes a quick drive through your local business strip to get a sense that every place is hiring. However, this feeling is well-founded, according to an article by Indeed's Economic Research Director Nick Bunker. Bunker explores the results of an Indeed survey which reveal that, despite high demand for workers, many job seekers say they don't feel a sense of urgency to get work. However, that may change in the fall, when many respondents say they are likely to pick up the search for work.

To help explain these developments, the Indeed Hiring Lab surveyed 5,000 people in the U.S., ages 18-64. The sample included individuals both in and out of the labor force and both employed and jobless workers. Unemployed workers are defined as those who are jobless and actively searching for paid work, either urgently or not urgently. Respondents who were jobless but only passively looking for work or not open to work were not included in the unemployed category but were considered out of the labor force.

The results show that many of the unemployed don't feel they need to find a job right away but do want to return to work sometime in the months following the time of the study, which occurred in June 2021. Coronavirus is a major factor keeping unemployed workers from stepping up their search activity. Among the unemployed, concern about COVID-19 is the most commonly cited reason for a lack of urgency in looking for work. In the eyes of many job seekers, vaccination against the virus – for themselves, family members, coworkers and customers – is a key milestone to be reached before they will be ready for a new job. What's more, unemployed workers seem more patient than they otherwise might have been thanks to the financial cushions of savings, employed spouses and enhanced unemployment insurance benefits. Care responsibilities at home are also a big impediment to more intense job searching. Thus, the widespread return of in-person schooling in the fall may spur greater intensity in the job hunt.

While many employers are pushing to hire in order to take advantage of the reopened economy, many workers don't feel the same sense of importance. In fact, only about 10% of survey respondents said they were urgently looking for a job. Part of the mismatch stems from the fact that most job seekers already have a job and are searching for work at a more relaxed pace.

However, 54% of unemployed workers said they were actively looking, though even among active searchers there's little impulse to take a job immediately. More than 20% of urgent job seekers reported they didn't want to take a new position immediately, while 78% of urgently looking job seekers said the opposite. Fifty-two percent of respondents not in a rush said they wanted to defer a new job at least a month. In total, 31% of all job seekers don't want to start a job right away.

The survey was conducted by Indeed on May 26-June 3, 2021, and polled 5,000 U.S. adults ages 18-64.

●●● employment research

Under pressure

Workers in U.S. and Canada are stressed yet engaged

The pandemic has had an unprecedented effect on working life. The results of this upheaval have often been dramatic and sometimes surprising. According to a study by Gallup, in the U.S. and Canada workers experienced the highest daily stress levels in the world, increasing their daily stress levels by eight percentage points during the pandemic to 57%, compared with 43% globally. Despite these high stress levels, though, U.S. and Canadian employee engagement levels actually rose by two percentage points to 34% regionally compared with 20% globally during the pandemic.

Globally, employee engagement decreased by two percentage points from 2019 to 2020 and the workforce reported higher worry, stress, anger and sadness in 2020 than in the previous year. At the time of the study, Western Europe had the lowest employee engagement levels globally, 11%, with France and Italy faring very poorly compared with the United States and Canada.

In the U.S. and Canada, stress and worry were experienced differently across gender lines, with 62% of working women reporting daily feelings of stress compared with 52% of their male counterparts. Working women worry more than men, with 53% of women reporting daily worry compared with 43% of men. Regionally, North America's daily levels of worry among workers increased by ten percentage points during the pandemic to 48%, compared with the rest of the world that remained at 41%.

Given hospitalizations and deaths due to COVID-19 as well as lockdowns, closed schools, increased remote work and unemployment, the above outcomes are not surprising. They represent the frustrations and struggles of millions of workers across the planet. Though U.S. and Canadian workers reported lower levels of thriving during the pandemic, dropping by five percentage points to 56%, their thriving levels were still higher than the those in the rest of the working world at 32%.

Employed American and Canadian men reported higher thriving levels (58%) than women (53%), though those findings are not surprising considering the high levels of stress, worry and sadness women experienced during the pandemic as many juggled work with becoming full-time caretakers for children or the elderly at home.

As employers rethink their workplaces in the future, they have lessons to learn from 2020. Moving forward, employers should understand the influence of employee well-being and employee engagement on workforce resilience. Successful employers need to not only generate profits; they also need to generate thriving employees who are capable of weathering crises today and in the future.

The study was conducted by Gallup and surveyed people 15 years of age and older in more than 160 countries.

••• gaming research

Plugging in

The rise of mobile gaming is here to stay

As the pandemic set in early in 2020, people around the world searched for distraction. For some this came in the form of mobile gaming, which experienced a sharp increase in the time following the onset of lockdown. New research from IDC and LoopMe suggests that this trend is here to stay.

The study predicts that 75% of the net rise in mobile gaming activity will remain even after a sense of normalcy is established in the next two years. The survey, which polled 3,850 smartphone users in the U.S., the U.K., Japan, Germany, Brazil and Singapore, asked respondents about their existing gaming activities, as well as their intentions regarding future gameplay time commitments after the pandemic is largely in-hand in their native countries.

In the six countries surveyed, more than two in three smartphone owners reported playing mobile games in recent months and 63% of respondents increased their mobile gameplay time after the pandemic began. Largely due to pandemic effects, the worldwide base of gamers that played on a smartphone or slate tablet monthly jumped 12% in 2020 from 2019, to roughly 2.25 billion.

A correlation was found between increased mobile gameplay time commitments and local pandemic effects, specifically, the per capita COVID-19 death rate. Three in four mobile gamers reported playing to be entertained or just to pass the time, while 4% said they were playing to engage in "safe" virtual social interactions that are supported by live multiplayer games. This notion is reinforced by the fact that multiplayer mobile games outperformed in 2020.

Six percent of today's mobile gamer community didn't play prior to the pandemic. These new gamers appeared to skew male and a few years younger in age than the broader base of pre-pandemic mobile gamers. After the pandemic is largely over (which is presumed to be late 2022 in most countries), it appears that 25% of the net increase in mobile gaming activity induced by the pandemic will dissipate and 75% of the net rise will remain indefinitely. This "new normal" will vary substantively by country, however, partly based on the severity of the local pandemic. The rise in mobile gaming has important implications for brands since the study also found that a majority of mobile gamers make critical buying decisions for their households.

The study was conducted by LoopMe and IDC and surveyed 3,850 smartphone users in the U.S., the U.K., Japan, Germany, Brazil and Singapore between April 1-12, 2021.


QUEST
MINDSHARE
Global research. Global reach.
Committed to quality sample.
> From ITDM to C Level Execs, We Own B2B
> Representative, Opted-in: Try Quest's unmatched consumer panels
> Best-in-Class Project Management and Programming Services
sales@questmindshare.com
questmindshare.com

A further note on stat testing

| By Stephen Hellebusch

snapshot

Stephen Hellebusch offers thoughts on a recent Data Use article.

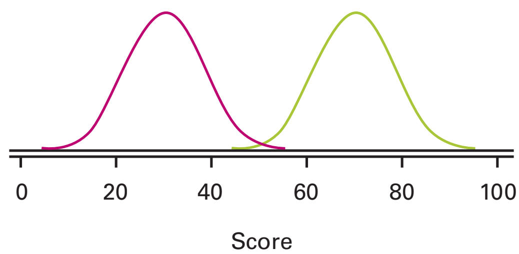
I enjoyed the recent article by Steven Millman, "Stat tests: what they are, what they aren't and how to use them" in the May/June 2021 issue of Quirk's. As I read, I mostly agreed and a few other thoughts came to mind.

The first was just a difference from my experience in the use of terminology. For me, the p-values represent significance levels and are the reverse of confidence levels. So, a significance level of $p \leq .05$ is exactly the same thing as a confidence level of 95%. For Millman, the p-value is .95 when the confidence level is 95%. For me, the 95% confidence level is 1-.05, the sharp line p-value. Both make sense; they are just different ways to say the same thing. Scientific writing will always couch results in the p-value method, usually showing the exact value, e.g., p = 0.002 and declaring whether or not statistical significance is achieved.

• • •

Another way to think about the logic of statistical testing for differences is that it is "backwards." Using two percentages from different groups of people (e.g., males, females, brand awareness), you first assume that the percentages are not different (the null hypothesis). If testing tells you the odds are less than x% that they really are the same, not different, you can reject the idea that they are the same. Then you can declare them "statistically significantly different at the (1-x)% confidence level."

What's actually going on is trying to determine whether or not two means or percentages are from the same population distribution or not. Assume that they are. If they are, then the test statistic, e.g., a Z-value or Student t value, will be a number that could easily come from the same distribution – the equivalent of between 20 and 40 on the accompanying graph. If they are not, it will be bigger – further out on the scale – say, between 50 and 80, much less likely to have come from that common distribution. We are "playing the odds."



• • •

An excellent chemistry teacher once used various little tricks to engage the class's interest. He would state various (sometimes boring) facts and then yell "SO WHAT?!" That woke us up! Then he'd explain what those facts meant, relative to whatever topic he was teaching. As pointed out in Millman's article, base sizes act as magnifying glasses, making statistical significance easier to achieve. In marketing research, we have conventions for "reasonable" base sizes in the hundreds or thousands. But I once saw an experienced professional get very excited because a 0.1% difference between two percentages was “statistically significantly different at the 95% confidence level.” Both base sizes were in the tens of thousands, provided by a syndicated service. As in the case of the 0.1% difference, sometimes statistical significance and substantive or meaningful significance are two very different things! When looking at insights, it’s not a bad idea to ask, “so what?”

• • •

Using the wrong test also struck a nerve. I wrote a short piece (“Ordered up wrong,” Quirk’s, February, 2006) that noted how the wrong test can lead to different conclusions than the correct one. One pet peeve is the reliance on survey programs that test all possible pairs in situations where there are more than two groups (usually, subgroups). The chi-square is designed to take all the information into account and test percentages across three or more groups; the Z test between proportions, which is what the survey programs often use, is not.

Another common error, based the convenience provided by data tabulation programs, is to test every row of a scale. For example, if a five-point purchase intent scale is used, the statistically correct procedure is to pick one (count it: ONE!) appropriate summary statistic (e.g., means, top-box percentages, top-two box) and use that to test whether groups differ. Testing every row of the scale between two groups violates a host of assumptions behind the testing, since no one row is independent of the others. The top-two box percentages dictate the percentage left that can be in the rest of the scale. Nevertheless, the survey data tables cheerfully proceed to test every row, generating a lot of meaningless “information.”

Hopefully, insights based on erroneous statistical testing are a minor finding in otherwise sound marketing research!

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

special advertising section

22 TOP HEALTH CARE RESEARCH COMPANIES

Health care research can be complicated due to the size of the industry and the sensitivity of the data involved. More importantly, it has immediate and important consequences for patients, caregivers, practitioners and others – making the quality of the research critical.

Companies specializing in health care research are accustomed to the difficulties of working in this industry and utilize a variety of methods to gain access to hard-to-find respondents efficiently and in compliance with information privacy regulations. Whether your research involves medical devices, rare-disease patients or physicians, the following companies feature an array of specialties to assist with any step of the research process.

Applied Marketing Science (AMS)

Founded 1989 | 40 employees
John Mitchell, President and Managing Principal

Applied Marketing Science (AMS) is a full-service market research consulting firm located in Waltham, Mass. With roots in the MIT Sloan School, our expertise in medical products and health care comes from over 30 years of providing results-driven, actionable insights to the world's best-known companies. Our experience spans medical devices, diagnostics, life sciences, pharmaceuticals and health care delivery across nearly all clinical specialties. Clients trust us to execute high-quality market research to inform global product strategy, design and marketing, leading to improved patient outcomes, more satisfied physicians and better financial returns. Partner with AMS to create innovative products and distinctive patient and clinician experiences.

Phone +1-781-250-6300
ams-insights.com/insights-for-health care-markets

Ascribe Services

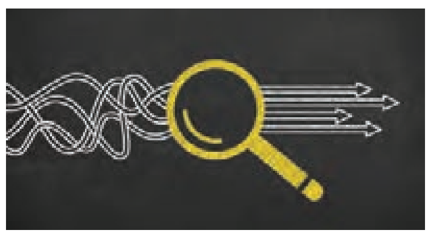
Founded 1999
Chrissy Stevens, Vice President, Services

Ascribe Services medical professionals organize and analyze text data that reveals insights for the health care industry. We also transcribe voice files, report adverse events and translate non-English to English. Leveraging Ascribe's industry-leading analytics and illustration technology, our results help drive action to evolve a product or service. Our team of registered nurses and medical technicians have years of professional education, training, hands-on practice and multiple adverse-events certifications ranging from the business of health care systems and clinical trials to concept testing. Health care researchers trust Ascribe Services to deliver excellence the first time within aggressive project timelines.

Phone +1-877-241-9112 ext. 55
goascribe.com/products-services/ascribe-services

Decision Analyst Inc.

Founded 1978 | 150 employees
Sara Sutton, Senior Vice President



The Medical Research Group at Decision Analyst specializes in qualitative investigations, strategic survey research, advanced analytics and consulting services for the pharmaceutical, medical, health and wellness industries. This Decision Analyst team of research specialists has the experience to solve the most difficult marketing problems. Their scientific and technical backgrounds ensure they understand the complex issues in the medical industry. Much of their experience among patients and HCPs is strategic, multiphase and often multicountry. The firm specializes in strategy research, market segmentation, new product concept testing and forecasting, messaging optimization, innovation services and advertising research.

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

Fieldwork

Founded 1980 | 250+ employees
Steve Raebel, President

Fieldwork has been a qualitative research partner for over 40 years. We recruit medical, business 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/medical-research-recruitment

Holden Healthcare

Founded 2006 | 50 employees
Jeffrey Kelsch, Managing Partner

With over 15 years' experience conducting research projects around the Asian region, Holden offers a unique and high-quality solution to your Asian health care market research needs. Consider Holden your "team on the ground" in Asia. 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 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 health care markets.

Phone +1-208-809-7117
E-mail jeffrey.kelsch@holdendata.com
www.holdendata.com

Insights Opinion

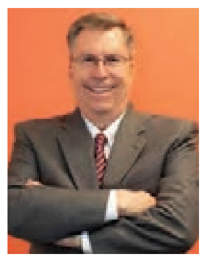
Founded 2015 | 50 employees
Sharoz Ghauri, CEO

Insights Opinion is a market research company providing project management and data collection services to market research firms and consultants since 2015. We at Insights Opinion stand ready to assist you in your research needs with our full slate of research capabilities and our coverage in North America, Europe, Latin America, APAC, the Middle East and the Caribbean. For many years, clients have counted on us for their consumer, B2B and health care research needs in these regions. Whether it is ongoing tracking studies or ad hoc research, we have a variety of capabilities to handle your research needs. Also, we are pioneers in online and CATI sampling. We stand for high-quality data, cutting-edge panel management technology and complete data protection compliance, confirmed by our ISO 20252 and 27001 certifications. We can support all kinds of projects and have expandable reach in B2C, B2B, community-building and health care capabilities!

Phone +1-646-475-7865 (U.S.)
+91-120-498-7860 (India)
www.insightsopinion.com

Ironwood Insights Group LLC

Founded 2017 | 300 employees
David Bryant, VP Data Analytics

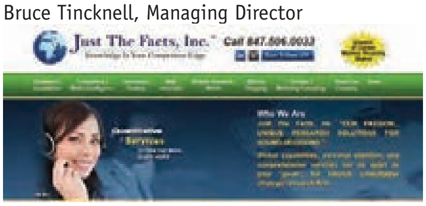


Ironwood Insights Group leads the health care research industry by offering experience and understanding of every aspect of the health care system. We are experts in reaching patients, plan members, providers and administrators. We have decades of experience working with hospitals, health care organizations, pharmaceutical companies and government agencies such as the Centers for Medicare and Medicaid Services. We measure patient experience with high-quality telephone, online and multimodal data collection services. Our call centers use the latest technology with cloud-based servers and dialers for increased production, quality and security. We are HIPAA- and TCPA-compliant and maintain strict security and confidentiality controls. Our full quantitative data collection services include consultation, questionnaire design, sample sourcing, survey fielding, data processing, data analysis and reporting. We are dedicated to providing our clients the best research solutions at reasonable rates. Call or e-mail today for “insights that provide clarity and drive action.”

Phone +1-602-661-0807 ext. 2140
E-mail davebryant@ironwoodinisght.com
www.ironwoodinsights.com

Just The Facts Inc.

Founded 1994
Bruce Tincknell, Managing Director



Just The Facts Inc. (JTF) has been a leader in health care research for 30 years. Our strategic toolkit includes quant methodologies (online, phone surveys), qualitative (focus groups, in-depth interviews), market assessment, secondary research and mystery shopping of hospitals and assisted-living facilities. Our expertise ranges from medical devices and equipment, pharmaceuticals and more. Our research is conducted with hospitals, physicians, health care professionals, patients and caregivers. JTF meticulously manages projects, attentively listening and understanding client objectives. Conducting quality health care research means having a strategic partner that effectively guides important assignments, delivering key insights. JTF’s research skills encompass patient satisfaction, decision-making and evaluating products and services, competitors and more. Let’s discuss your specific needs, ensuring your initiatives are effectively executed. Call for a free consultation!

Phone +1-847-506-0033
www.justthefacts.com
Testimonials www.justthefacts.com/testimonials-x-30

Kantar, Profiles Health Division

Founded 1996 | 600 employees in 25 countries
Jennifer Carrea, Managing Director, Americas and Global Health, Kantar Profiles Division

Kantar is the world’s leading evidence-based insights and consulting company. We have a complete, unique and rounded understanding of how people think, feel and act, globally and locally in over 70 markets. By combining the deep expertise of our people, our data resources and benchmarks, our innovative analytics and technology, we help our clients understand people and inspire growth. With comprehensive access to physicians, HCPs, patients and payers, we bring you closer to health care audiences so you can understand the people and trends shaping the health care research landscape and meet your unique objectives for business growth. We are experts at collecting and connecting data you can trust. With our industry-leading survey design and sampling methodologies, we collect quantitative and qualitative primary market research data from self-reported answers and appended profiles using the Kantar Profiles Network. Through our network and expertise in online profiles, we deliver automated access to first-party data compliantly, with speed and at scale.

hubs.ly/H0SLGCb0

MedSurvey

Founded 2002 | 35 employees
Paul Golota, CEO and Co-founder

Named as the 2020 Panel Company of the Year (Marketing Research and Insight Excellence Awards) and recognized industry-wide for groundbreaking techniques, MedSurvey helps organizations gather quality health care data by conducting market research surveys with health care professionals and patients. MedSurvey has developed several proprietary methods that help to ensure data integrity and project success. This includes working with client-supplied target lists that identify individuals and/or medical facilities. Our best-in-the-business recruitment techniques, which involve senior-level project managers and an in-house call center, help to leverage our deep relationships with the medical community and our focus on creating outstanding participant experiences, which means faster project turnaround, better-quality data and happier clients.

Phone +1-866-963-3000
www.medsurvey.com

Mindspot Research

Founded 2006 | 8 employees
Lynnette Leathers, CEO and Lead Moderator

As online research experts, we have been meeting people with extra challenges on their terms since 2006. Our team of experienced, caring, professional moderators aims to improve patient outcomes and therapies, contributing to a better quality of life. People with wellness challenges often find it difficult to drive to a physical location. We bring the group experience and conversation to them. Mindspot creates the opportunity for people who live with a chronic illness or specific challenge to interface with others facing the same circumstances. We focus on patient-centered needs, pre-clinical trial understanding and quantitative assessments. You've got questions, we've got answers.

Phone +1-407-730-4603
www.mindspotresearch.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

Olson Research Group Inc.

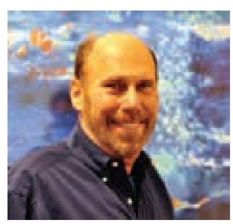
Founded 1995 | 45 employees
Charles Olson, CEO

Since 1995, Olson Research has provided the full spectrum of qualitative and quantitative market research services to the pharmaceutical and life sciences industries. With access to 960,000 U.S. health care decision makers, we offer primary research and data collection capabilities across all sectors, including physicians, health care executives, para-professionals and patients/caregivers. Our senior level consultants each possess 20+ years of industry experience and our team of seasoned project managers average 10+ years of industry experience, enabling them to successfully navigate the most complex and challenging projects. Let Olson Research exceed your expectations on your next marketing research project.

Phone +1-267-487-5500
www.olsonresearchgroup.com

Precision Research Inc.

Founded 1959 | 25-49 employees
Scott Adleman, President



Precision has been recruiting and interviewing medical professionals, health care decision makers and hard-to-find patients for 30+ years. We don't limit our recruiting to our database – we hunt, network and use social outreach to identify and recruit targeted respondents. We have a great online platform and a modern Chicago research center, or we happily recruit to the venue of your choice. In addition, our in-house moderators can fill in scheduling gaps or tackle the full project.

Phone +1-847-257-0827
RFQ Quotes@preres.com
www.preres.com

Rare Patient Voice LLC

Founded 2013 | 14 full-time, 50 part-time patient advocates
Wes Michael, President and Founder

Rare Patient Voice recruits hard-to-find patients and caregivers (rare and non-rare) in the U.S., Canada, U.K., France, Germany, Italy and Spain for qualitative and quantitative market research. We attend patient events such as conferences and walks to build our panels so that our patients are authentic and we can complete recruits within two weeks. We focus on recruiting only. With 100,000 patients and caregivers across 618 diseases/conditions, our panels include: all cancer types, Crohn's, cystic fibrosis, diabetes, epilepsy, Fabry, Gaucher, hemophilia, HIV, Huntington's, lupus, mental health, multiple sclerosis, Parkinson's, primary immunodeficiency, PNH, pulmonary hypertension, sickle cell and spinal muscular atrophy. To get a bid with feasibility and costs at any time: pam.rarepatientvoice.com. Learn more about Rare Patient Voice and our services on our YouTube channel: www.youtube.com/watch?v=vq6n_JxtIDg&t=2s

Phone +1-410-218-0527
www.rarepatientvoice.com

RC Horowitz & Company Inc.

Founded 1983 | 5 employees
Rob Horowitz, President

Trusted, creative experts in recruiting low-incident, rare/orphaned disease, RCHorowitz has developed a reputation of successfully completing the "undoable" with well vetted, validated respondents using experienced recruiters and qualified referral sources. We see ourselves as a collaborative partner and have a personal commitment to the success of every project. Our perspective provides a fresh approach to complex and challenging health care recruiting, with both patients and health care professionals for qualitative research. Our size makes us nimble and our old-world sensibility to recruiting gets you the right respondents on time and on budget. Over the past three decades RCHorowitz has built a reputation as a premier recruiting and fieldwork management service for discerning clients worldwide. Meeting challenging deadlines and finding creative solutions to meet your objectives are a specialty. We enjoy tremendous success because we recognize that we are measured one study at a time.

Phone +1-212-779-0033; +1-866-704-8000
www.rchorowitz.com

Reckner Healthcare

Founded 1991 | 225 employees
Jason Gamber, Vice President

Reckner Healthcare provides complete fieldwork solutions for health and life sciences market research projects. From physicians and allied health professionals to hospital admin and decision makers, we are the industry's most trusted health care fieldwork company, delivering the best respondents for 30 years. With our Respondent First℠ philosophy, we inspire participation of the most insightful, knowledgeable health care professionals. Our Experience Reckner℠ approach delivers a collaborative research process unparalleled in the industry. With Experience Reckner℠ and Respondent First℠, your data quality is higher, your respondents more engaged and your insights more meaningful.

Phone +1-215-822-6220
recknerhealth care.com

Research America

Founded 1985 | 300 employees
Robert Porter, CEO

Research America is a collaboration of 16 leading research companies providing full-service marketing research. Together with our Natural Marketing Institute and Segmedica divisions, we are a unique powerhouse in the health and sustainability research industry. We analyze data in-house and provide online reporting dashboards that allow you to view immediate results. Our team of experienced researchers is comprised of skilled communicators with knowledge in focus groups, face-to-face and telephone interviews, CAWI, IVR, surveys, polls and questionnaires. We provide expertise in health care, pharmaceutical, health and wellness, sustainability research, customer experience, brand research, data collection, analysis and reporting. Contact us today to discuss your research needs. Please see the following link to view our capabilities: youtu.be/8owQRtqHMwU.

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

Schlesinger Group

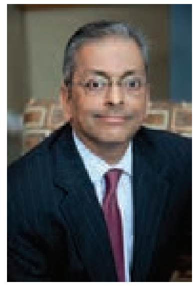
Founded 1966 | 1,200 employees
Rob Ramirez, Chief Client Officer

Schlesinger Group has built a reputation as one of the largest and most innovative health care research providers in the world. Vast global panels, unparalleled sampling, recruiting and project management expertise come together for exceptional results at the speed and quality you need for success in your qualitative and quantitative health care studies. Our business focuses on medical, pharmaceutical and clinical research, with access to deeply vetted and profiled populations of professionals and patients. With more than 8,000 health care studies supported annually, our dedicated health care team uses a multi-tiered approach to connect you with the right audiences. Connect@SchlesingerGroup.com.

Phone +1-203-899-0475
SchlesingerGroup.com

Shapiro+Raj

Founded 1955 | 80 employees
Zain Raj, CEO



Shapiro+Raj is a Top 10 independent strategic research and insights consultancy in North America. We are purposefully built to help clients spark transformative outcomes for their businesses and find new ways to grow in today's ever-changing landscape. We have integrated social science with behavioral economics and extensive brand marketing experience to connect the dots between what consumers say and do, resulting in insights that open new pathways for growth. We are one of the Top 25 Most Innovative Research Companies and a Top 10 Strategic Consultancy, according to Greenbook's 2021 Global GRIT report. We are also a nationally certified Minority Business Enterprise.

Phone +1-312-965-2319
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

WebMD/Medscape Market Research

Founded 1995 | 1,800 employees
Audrey Rosen, Vice President, Market Research

Medscape offers you what no other health care market research company can: engaged health care professionals who are regularly accessing Medscape for clinical content. Our market research services team leverages these Medscape members to provide you with research solutions that deliver high-quality results. For over 20 years, Medscape Market Research has provided industry-leading recruitment and research solutions for both qualitative and quantitative studies. We use our advanced targeting capabilities leveraging first- and third-party data linked to our broad professional network of highly engaged health providers. This enables us to deliver the respondents and the results that you are looking for. Our members include MDs, pharmacists, medical directors, residents, NPPAs and nurses. We also offer full-service programming and reporting.

Phone +1-212-624-3780
www.MedscapeMarketResearch.com

snapshot

Study finds that low-cost/no-cost efforts like honesty, humor and empathy can create delighted customers.

••• customer experience research

Little things mean a lot

Measuring and managing customer delight

| By John Goodman, Sally Hurley, Thomas Hollmann and Scott Broetzmann

Researchers have correctly focused the bulk of customer experience (CX) measurement resources on the dissatisfied end of the continuum. John Goodman and Marc Grainer of Customer Care Measurement & Consulting's (CCMC) team led the original White House-sponsored research in the 1974-1984 time frame on complaint-handling.[1,2] Business Week noted that, "Sparked by some landmark studies commissioned by the White House Office of Consumer Affairs....a new attitude has been born...." Our models included quantification of the payoff of improved loyalty and for winning new customers via word of mouth (WOM) using broad, conservative assumptions. B. Joseph Pine and James Gilmore, in their book "Experience Economy," initiated scrutiny of the other end of the spectrum: delight.[3] They tell of the Nordstrom store where a woman demands and is given a refund for tires not bought at Nordstrom (she bought them at a tire store that used to be at that location). Finance executives suggest that a refund in that case was inappropriate.

Further, Matt Dixon, Karen Freeman and Nicholas Toman

(Dixon, et al.), titled their article in the July 2010 Harvard Business Review, "Stop trying to delight customers!" arguing that a delight strategy is almost never cost-effective.[4] Dixon, et al., report the results of a comparison of customer loyalty of satisfied vs. dissatisfied customers, not delighted customers. This is a critical research and measurement issue. Satisfied customers are customers whose expectations have been met. On the other hand, a delighted customer is usually defined as a customer whose expectations have been exceeded. Therefore, the case presented in the Dixon, et al., article is potentially not applicable to the central topic of customer delight.

The past decade has seen a surge in literature on how to create delighted customers by managing staff to deliver it but the measurement aspect has been deficient. Further, much of the literature suggests a range of delight actions but no one has attempted to create a complete taxonomy of delight actions or determine the relative impact of delight actions. A goal of always exceeding expectations is unrealistic and can demoralize frontline staff with no hope of ever meeting the stated objective.

CCMC and Arizona State University's Center for Service Leadership (CSL), at the suggestion of and supported by VIPdesk, has conducted the first rigorous study of the range of delighters and their impact. While not comprehensive or perfect, it does raise important issues for the CX, service and marketing professions on measuring and managing delight as well as measurement challenges for market research professionals. Specific findings include:

- Delight does deliver significant loyalty, margin and WOM benefits.
- Digital channels appear to be as powerful as in-person or telephone channels.
- Delight can be inexpensively implemented in several discrete manners.
- Delight must be measured separately from satisfaction across all channels.
- Better metrics/methods are needed for quantifying WOM impacts.

Here we share our methodology, key findings and implications for action.

Methodology

CCMC and CSL surveyed a sample of 2,519 households with incomes above $100,000 derived from a commercially available panel. The sample was projectable on the U.S. population from a gender and geographic perspective. Respondents were asked if they had experienced delight in their interactions with a company in the last six months. If they had experienced delight, they were presented with a list of 15 delight actions, each accompanied by an example. The list was derived from a taxonomy presented by Steve Curtin in his book, "Delight Your Customers," to which we added eight more categories based on several surveys where we asked for a verbatim description of the delight experience.[5] An "other" category was also provided.

About two-thirds of the total panel reported at least one delight experience. Customers experiencing delight reported an average of 3.5 delight experiences. These customers were then asked to identify the experience that produced the most delight and the industry or product area of the delighting company. The remaining third of customers who had not experienced delight were asked about their "best" service experience. Both delighted and non-delighted respondents were asked their primary communication channel used during the delight experience. Four market actions were measured including likelihood of future repurchase, WOM, social posting and willingness to pay more for the same product or service from that company. Finally, within each industry, comparisons were made between the loyalty of respondents that were delighted and the remaining non-delighted respondents to estimate the increase in top-box loyalty associated with the delight experience. Verbatim comments provided additional detail.

One area explored in more depth was the impact of WOM on the actions of those receiving the referrals in-person (as opposed to online postings). Our usual question asking how many people were told about the experience was followed by a second question asking, "Of those told, how many, to your knowledge, took action on your referral?" We found that about half of respondents say they do not know but the other half provide relatively consistent data. For satisfied customers, usually between 20 and 30 percent of customers are reported to act. While this information is somewhat speculative, companies ranging from airlines to gaming companies

Figure 1: Prevalence of Delight Experiences and Rank Ordering of Most Important Delight Experience

Type of Delighter	% Mentioned As Delighter	% Top Delighter
Offered good value for money	34%	12%
Was honest - e.g., “I’m so sorry our warehouse is understaffed and we are behind on shipments due to COVID-19”	35%	10%
Was enthusiastic - e.g., “Let's get this done right now!”	33%	10%
Was transparent with explanations - e.g., “Here are three things you need to know to avoid problems with this product/service”	29%	8%
Showed interest/concern - e.g., “How is your kid doing with the flu?” “That sounds like a cute dog there”	27%	6%
Created a fun or entertaining interaction	27%	9%
Was empathetic	25%	6%
Provided unique knowledge - e.g., providing golden nuggets of information you can use	25%	7%
Connected with you in a personal way - e.g., “I've travelled with my 85-year-old father and I know how stressful it is”	21%	6%
Provided extra value - e.g., dog treats at Starbucks, no extra charge for an after-hours emergency repair	20%	7%
Utilized surprise - e.g., “Thanks for waiting two minutes; your order is now free”	19%	6%
Gave you compliments - e.g., “I love your voice, love your necktie/shawl”	17%	3%
Sold other products or services that were useful/tailored to me	16%	4%
Acted humorously - e.g., saying on an airplane “If you're seated next to a child or an adult acting like a child...”	15%	2%
Exercised heroics - e.g., “I'll bring this to your house myself this evening”	13%	4%
Other	2%	2%

have felt it is at least directionally correct. This question allows us to translate WOM into an estimate of new customers won from referrals. It parallels research conducted by Keller-Fay on digital WOM impact on sales.[6]

Key findings

■ **Honesty and transparency are powerful delighters.**

Customers want to know the limitations of products and services they buy. Therefore, honesty and transparency, highlighted in yellow in Figure 1, are two of the top delighters. This is especially important in industries with complex or confusing products and contracts. For instance, in the auto industry, honesty and transparency are as important in producing delight as getting a great price. Likewise, transparency and honesty are strong delighters for e-commerce, financial services and medical care. The right column in Figure 1 shows the rank ordering of the most important type of delight experienced by consumers.

■ **Cross-selling is a major delighter.**

As noted by the green highlight in Figure 1, 16 percent of consumers mentioned being delighted by being cross-sold other products. In Figure 2, we show that, of those delighted by a cross-sell, 66 percent indicated they would pay more for the same products from that company. Note that the amount willing to be paid is the average across all product lines including auto and fashion, explaining the seemingly high amount presented. The critical requirement is that the cross-selling is appropriate and tailored to the customer, which means that the CSR must know what the customer already has, and their needs, based on their persona

Figure 2: Willingness to Pay More For The Same Products From Company Due to Delight

Type of Delighter	DELIGHTED: % Definitely Would Pay More	DELIGHTED: $ Amount Willing To Pay More
Sold other products or services that were useful/tailored to me	66%	$676
Was transparent with explanations - e.g., 'Here are three things you need to know to avoid problems with this product/service'	41%	$367
Showed interest/concern - e.g., 'How is your kid doing with the flu?' 'That sounds like a cute dog there'	41%	$329
Created a fun or entertaining interaction	45%	$326
Utilized surprise - e.g., 'Thanks for waiting two minutes - your order is now free'	54%	$322
Offered good value for money – Great Deal	51%	$321
Gave you compliments - e.g., 'I love your voice, love your necktie/shawl'	49%	$315
Connected with you in a personal way - e.g., 'I've travelled with my 85-year-old father and I know how stressful it is'	47%	$314
Was honest - e.g., 'I'm so sorry our warehouse is understaffed and we are behind on shipments due to COVID-19'	54%	$296
Acted humorously - e.g., saying on an airplane 'If you're seated next to a child or an adult acting like a child...'	44%	$291
Exercised heroics - e.g., 'I'll bring this to your house myself this evening'	60%	$289
Provided unique knowledge - e.g., providing golden nuggets of information you can use	45%	$281
Provided extra value - e.g., dog treats at Starbucks, no extra charge for an after-hours emergency repair	48%	$268
Was enthusiastic - e.g., 'Let's get this done right now!'	42%	$253
Was empathetic	49%	$217
OVERALL	**48%**	**$315**

or history.

While customers do not usually like sales pitches, if they feel you are trying to accessorize or help resolve a current gap in the overall experience, they will welcome the suggestions and walk away feeling delighted. For example, Harley-Davidson finds most riders want to personalize their motorcycle and are enthusiastic about spending a great deal, often as much as the basic price of the bike, on chrome and other accessories.

■ **Delight can be delivered cheaply via customer service representatives' actions, behaviors and words.**
The 15 approaches to delight range from inexpensive transparency, patient/detailed explanations and tailored experiences delivered by empowered employees to enthusiasm and quirky humor – and to more costly actions, such as surprise freebies, discounts and very low prices.

In the 15 approaches listed on the left-hand column of Figure 2, the eight with green arrows are produced by customer service representative (CSR) communication/interaction with the customer and have no tangible cost beyond the application of creativity by the CSR and their talk or typing time expenditure. This figure also shows the percentage of customers experiencing a particular delighter who indicated they would pay more for the same product from the same company based on being delighted. Again, the amount paid is the mean across all product lines. Figures 3 and 4 provide data specific to auto and e-commerce markets. Surprisingly, the CSR behaviors produced almost exactly as many customers willing to pay more as the more costly "great deal" and "freebies" (42-54 percent vs. 48-51 percent). Finally, the experience that leads to the most consumers willing to pay more (66 percent) is being cross-sold other products that were useful, which produces more revenue.

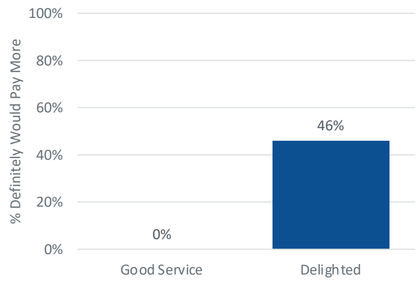
Delight can be achieved by personal interaction as easily as monetary means.

Delight can be achieved by personal interaction as easily as monetary means. For many delighters, the only expenditure required is the time to listen and then respond with emotion and information. The eight actions highlighted with green arrows are all low-effort but very effective delight actions.

What action creates delight can also vary by customer and can often be

Figure 3: Delight in Industry Verticals: Focus on Automotive

Type Of Delighter	Overall	Automotive
Was honest	35%	42%
Offered good value for money	34%	43%
Was enthusiastic	33%	34%
Was transparent with explanations	29%	28%
Showed interest/ concern	27%	26%
Created a fun or entertaining interaction	27%	15%
Provided unique knowledge	25%	27%
Was empathetic	25%	24%
Connected with you in a personal way	21%	16%
Provided extra value	20%	28%
Utilized surprise	19%	14%
Gave you compliments	17%	9%
Sold other products or services tailored to me	16%	15%
Acted humorously	15%	15%
Exercised heroics	13%	5%
Other	2%	5%



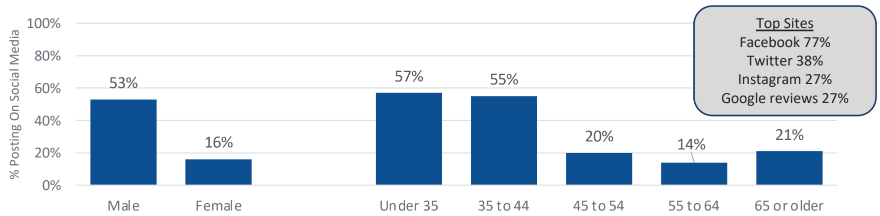
Top Channels Of Delight
58% In-person
16% Telephone
11% E-mail

Measure	$ Amount Willing To Pay More
DELIGHTED	$563
GOOD SERVICE	$121
BOOST TO FUTURE SPEND FOR DELIGHT	$442
PERCENT INCREASE FOR DELIGHT	365%

Begin with 1 delighted automotive customer…
86% spread positive word of mouth…
to 5.0 people on average…
With 36% of those going on to purchase…

=

1.5
new customer
purchases from WOM



If six people are told (a median across all industries), at least two people act on the delight recommendation.

literally opposite experiences tailored to the customer. For example, one of the authors arrived on the club floor of a five-star hotel in Tokyo at 7 a.m. and looked for the usual coffee urn to grab a quick cup of coffee. There was not one in sight. We were approached by a staff person who asked if we wanted some coffee. When we said yes, they went in the back room and came out in two minutes with a fresh-brewed (though rather small) cup of coffee. We drank that in two minutes and asked for another. Again, a two-to-three-minute wait; same for the third cup. We finally asked why there was no large coffee urn. “That would not be personal service and we want to provide personal service,” was the reply. Personal service could include providing coffee both ways, so that two different segments can be simultaneously delighted.

■ Word of mouth and intention to repurchase from delighted customers is more impactful than WOM from satisfied customers.

In past studies, we found that satisfied customers will tell several friends and acquaintances about their satisfactory experience. When we take the next step of asking, “To the customer’s knowledge, how many of those told about the satisfactory experience actually act on the recommendation?” we found that about 20 percent of those told are reported to have taken action. In this study of delight experience and resulting market actions, results for the same question show that, across all industries, an average of 50 percent of those told about a delight experience were reported by the respondent to have taken action on the recommendation. The range was 36 percent for auto to 69 percent for beauty and fragrance.

This means that if six people are told (a median across all industries), at least two people act on the delight recommendation. This is twice the reported impact of WOM from customers reporting good or satisfying service.

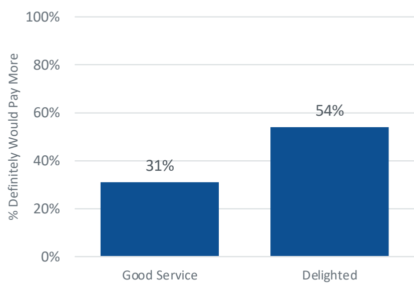
Figures 3 and 4 show the possible quantification of the impact of a delight experience for the auto and e-commerce industries based on the subsamples from those two industries. For the auto industry, a median of 5.5 people were told of the experience and an estimated 36 percent of those told took action, meaning that for each customer delighted, 1.5 new customers may be generated. For e-commerce, 1.9 customers are produced for each customer delighted.

We recognize that the self-reported information on how many of those told acted on the referral is a weak metric. Across dozens of studies, the data is consistent and we agree that better metrics are needed. This is an area for experimentation, especially within online social communities where closer

Figure 4: Delight in Industry Verticals: Focus on Beauty and Fragrance

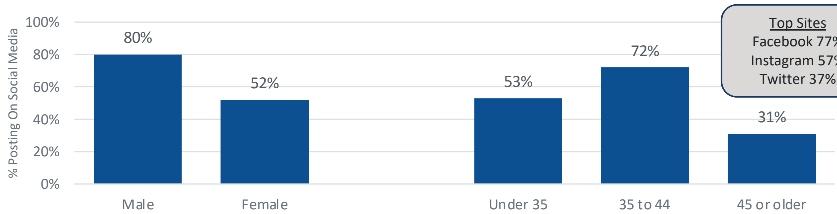
Top Channels Of Delight
33% In-person
22% E-mail
19% Social media interaction

Type Of Delighter	Overall	Beauty and fragrance
Was honest	35%	32%
Offered good value for money	34%	35%
Was enthusiastic	33%	37%
Was transparent with explanations	29%	30%
Showed interest/ concern	27%	27%
Created a fun or entertaining interaction	27%	35%
Provided unique knowledge	25%	27%
Was empathetic	25%	21%
Connected with you in a personal way	21%	17%
Provided extra value	20%	13%
Utilized surprise	19%	22%
Gave you compliments	17%	29%
Sold other products or services tailored to me	16%	27%
Acted humorously	15%	13%
Exercised heroics	13%	14%
Other	2%	3%



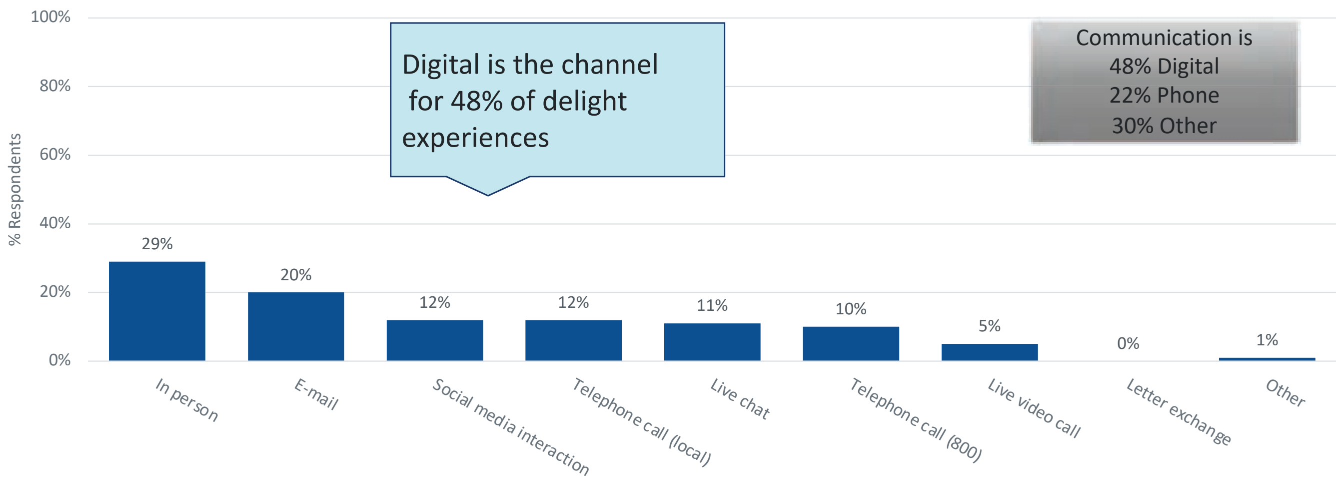
Measure	$ Amount Willing To Pay More
DELIGHTED	$270
GOOD SERVICE	$55
BOOST TO FUTURE SPEND FOR DELIGHT	$215
PERCENT INCREASE FOR DELIGHT	391%

Begin with 1 delighted beauty customer…
81% spread positive word of mouth…
to 5.5 people on average…
With 69% of those going on to purchase…
=
3.1
new customer purchases from WOM



Top Sites
Facebook 77%
Instagram 57%
Twitter 37%

Figure 5: Digital Delight is as Prevalent as Telephone or In-Person



Survey question: What was the PRIMARY way that you communicated with the company that caused this DELIGHTFUL CUSTOMER SERVICE EXPERIENCE?

Live video chat calls were one of the most-mentioned channels as a source of delight.

measurement and tracking of future purchases is possible.

Our analysis of the top-box ("definitely will repurchase") intention to repurchase the product (for 10 product/industry categories) was 5-9 percent higher for delighted customers than for customers who were not delighted but still declared their experience the best in the last six months. This finding refutes the contention by Dixon, et al., that delighting customers produces no consistent payoff over reducing their effort and leaving them satisfied.

■ **Delight can be delivered using digital channels.** One of the greatest surprises came from the question about the primary channel used for communication with the company. Forty-eight percent of delighted customers reported that they used digital channels – e-mail, chat or social media. Figure 5 shows the breakdown of channels for the primary delight experience.

Figure 6, which reports channels used for all delight events (not just the most important), shows that every type of delight could be delivered by any of the channels. This is surprising because we did not expect that emotional messages such as enthusiasm and empathy could be delivered easily via digital channels. In fact, delight is almost as easily created by e-mail and chat as in-person or phone interactions. The results also did not vary much by age – also a surprise. In addition, we found that live video chat calls were one of the most-mentioned channels as a source of delight.

Implications for action in the service, marketing, CX and market research functions

There are five major implications of the CCMC/CLS/VIP delight study for marketing, CX, service and market research.

1. Marketing and CX must advocate for transparency and honesty in all sales and marketing messages. Such transparency not only fosters delight, it prevents many problems by setting proper customer expectations. For example, when a Southern insurance company's welcome letter highlighted the limitation of the valuables covered by the homeowner's policy, customers thanked the agent for pointing it out and asked to buy a rider to cover the additional valuables. Sales objected to the letter as focusing on a negative but the honesty actually generated additional revenue and avoided future problems.

2. CX and service should focus on training and empowering CSRs to deliver the eight humanistic experiences that cause delight – from empathy and enthusiasm to transparency, interest and concern. Further, supervisors must be directed to encourage delight and use monitoring and measurement tools to effectively evaluate its delivery across all channels.

3. CX and marketing must adapt delight techniques to digital channels. The fact that 48 percent of delight is delivered digitally now in an unsystematic manner means that much more can be delivered if a conscious effort is made and A/B experiments run to identify the most successful strategies.

Figure 6: Live Video Chat is Emerging Strongly

Video chat uses eye contact to connect and create trust

Type of Delighter	Overall	E-mail	Live chat	Live video call	Social media	In person	Telephone (local)	Telephone (800)	Letter	Other
Was honest - e.g., "I'm so sorry our warehouse is understaffed and we are behind on shipments due to COVID-19"	35%	33%	33%	48%	38%	34%	38%	34%	25%	30%
Offered good value for money	34%	31%	31%	31%	42%	37%	34%	29%	38%	50%
Was enthusiastic - e.g., "Let's get this done right now!"	33%	29%	29%	42%	22%	36%	31%	47%	38%	35%
Was transparent with explanations - e.g., "Here are three things you need to know to avoid problems with this product/service"	29%	29%	29%	29%	24%	24%	37%	44%	13%	10%
Created a fun or entertaining interaction	27%	26%	25%	41%	32%	30%	21%	20%	0%	25%
Showed interest/concern - e.g., "How is your kid doing with the flu?" "That sounds like a cute dog there"	27%	27%	20%	25%	25%	30%	32%	24%	25%	20%
Was empathetic	25%	29%	18%	23%	20%	24%	30%	35%	0%	15%
Provided unique knowledge - e.g., providing golden nuggets of information you can use	25%	21%	21%	37%	28%	23%	27%	34%	25%	35%
Connected with you in a personal way - e.g., "I've travelled with my 85-year-old father and I know how stressful it is"	21%	21%	16%	24%	17%	22%	24%	21%	25%	20%
Provided extra value - e.g., dog treats at Starbucks, no extra charge for an after-hours emergency repair	20%	24%	23%	17%	20%	18%	17%	20%	25%	20%
Utilized surprise - e.g., "Thanks for waiting two minutes - your order is now free"	19%	22%	24%	36%	23%	12%	21%	12%	25%	25%
Gave you compliments - e.g., "I love your voice, love your necktie/shawl"	17%	18%	16%	29%	23%	17%	15%	8%	13%	15%
Sold other products or services that were useful/tailored to me	16%	19%	19%	27%	23%	12%	13%	8%	25%	10%
Acted humorously - e.g., saying on an airplane "If you're seated next to a child or an adult acting like a child..."	15%	17%	13%	33%	21%	14%	13%	7%	0%	10%
Exercised heroics - e.g., "I'll bring this to your house myself this evening"	13%	19%	13%	17%	19%	7%	15%	9%	13%	5%

Survey question(s): Which of the items listed below caused you to be DELIGHTED with this [PN: Insert answer to Q3] CUSTOMER SERVICE EXPERIENCE? (Click on all that apply.)
What was the PRIMARY way that you communicated with the company that caused this DELIGHTFUL CUSTOMER SERVICE EXPERIENCE?

4. Market research must work to more effectively categorize and measure delight and measure the impacts of WOM across all channels. Further, the impact of responses to social posting must be quantified. The best approach is to run experiments within a large social community.

5. Market research should translate the B2C delight research reported here to the B2B and employee arenas. CCMC has found that B2B customers reporting scores of 10 on a Net Promoter question behave similarly to consumers who have been delighted. Likewise, our research has shown that employee recommendations of the company as a great place to work are impacted by points of pain and frustrations in a manner like points of pain experienced by consumers.[7] A study of the mechanisms and payoff for delighting employees would also be in order.

Research has been sparse

While complaints and satisfaction have been the subject of rigorous market research for decades, delight research has been sparse, especially across digital channels. This preliminary study by CCMC/CSL/VIPDesk suggests that there is as much income to be made at the high end of the CX spectrum as is being earned fixing the lowest end of the spectrum. We hope this study is the first of many in the field.

John Goodman is vice chairman of Customer Care Measurement & Consulting. He can be reached at jgoodman@customercaremc.com. Sally Hurley is CEO of VIPdesk Connect. She can be reached at sally.hurley@vipdeskconnect.com. Thomas Hollmann is executive director, Center for Services Leadership and clinical associate professor of marketing at the W.P. Carey School of Business at Arizona State University. He can be reached at thomas.hollmann@asu.edu. Scott M. Broetzmann is president and CEO of Customer Care Measurement & Consulting. He can be reached at scott@customercaremc.com.

REFERENCES

1 "Making service a potent marketing tool," Business Week, June 11, 1984.

2 John Goodman and Marc Grainer, Increasing Customer Satisfaction, U.S. Office of Consumer Affairs, 1984.

3 Joseph Pine II and James H. Gilmore, "Experience Economy," Harvard Business Review Press, 1999.

4 Matt Dixon, Karen Freeman and Nicholas Toman, "Stop trying to delight your customers!", Harvard Business Review, July 2010.

5 Steven Curtin, "Delight Your Customers," American Management Association, 2013.

6 Andrew Baker, Naveen Donthu and V. Kumar, "Investigating how word of mouth conversations about brands influence purchase and retransmission intentions," Journal of Marketing Research, April 2016, p. 255.

7 John Goodman, Scott Broetzmann and Ted Nardin, "Fighting the Daily Grind," Quirk's, May-June, 2021.

snapshot

From insurance to chemical manufacturing, case studies in examining the role of emotion in CX.

••• customer experience research

One singular sensation

For improved customer and company outcomes, elicit a targeted emotional response

| By Jim Tincher

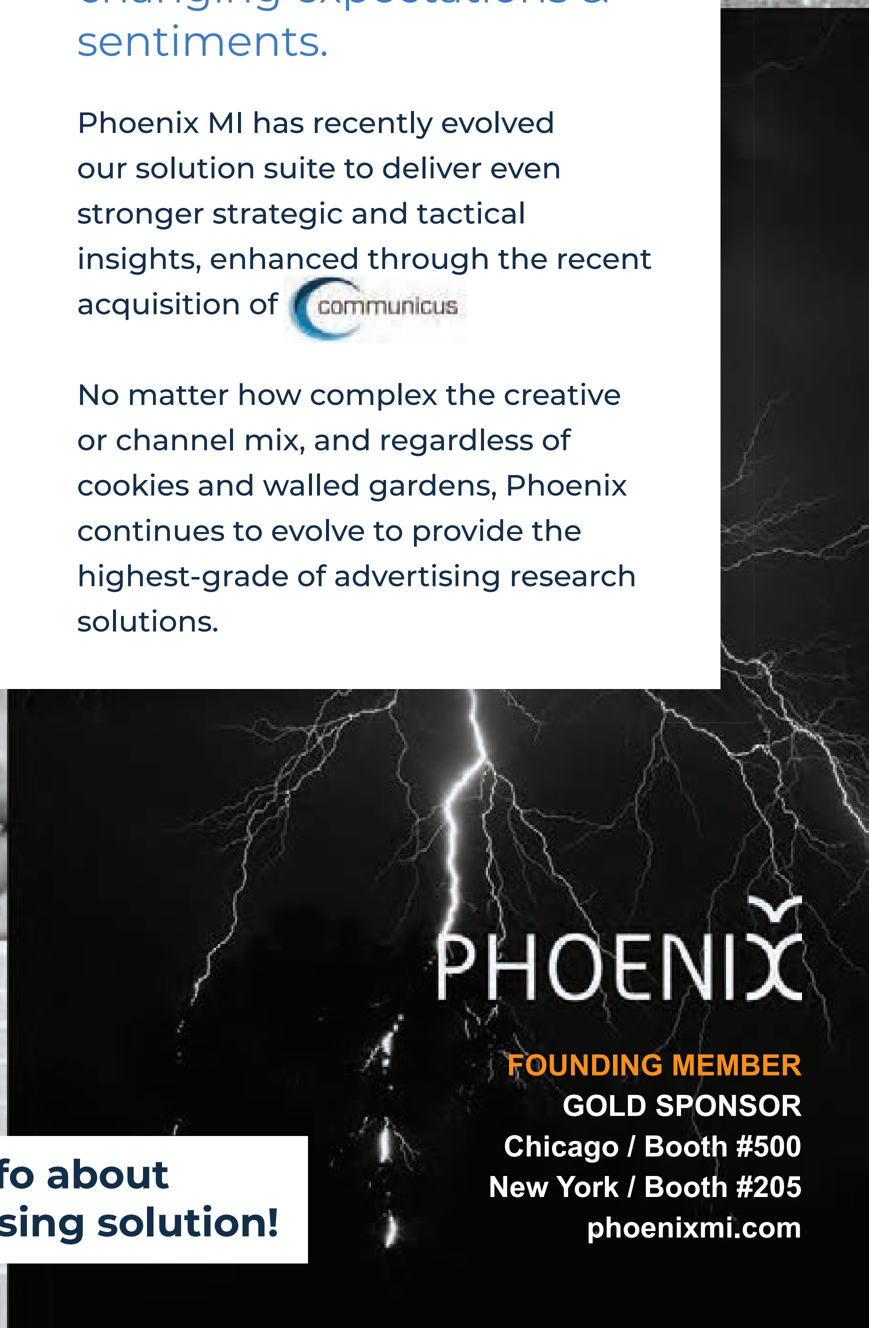
Over the past decade, customer experience (CX) programs have proliferated, becoming a must-have investment for companies hoping to reap the financial benefits of increased customer loyalty and satisfaction.

Unfortunately, most organizations have little to show for their investments and mounting evidence indicates the problem is dire.

In his 2019 report, Customer Experience at a Crossroads: What Drives CX Success?, CustomerThink CEO Bob Thompson found that only one in four CX programs could show either quantified benefits or a competitive edge earned through their efforts. One year later, Forrester predicted that one in four CX professionals would lose their jobs because of a lack of business impact. (And that was before the pandemic.)

Many programs, rather than breaking down silos and driving organization-wide change, have actually created their own silos – focusing on improving survey scores that too often don't produce measurable financial benefits.

The situation is even worse in B2B companies, which account for more than 60% of the U.S. economy. When looking at CX maturity, Qualtrics' XM Institute reported that 59% of all companies are in the lowest two-fifths of customer experience management stages. When you narrow that down to just B2B companies, the number rises to nearly 80%.



The brighter side

But what about the brighter side of that same coin – the 25% of companies that are moving the CX needle to create great customer experiences that inspire their customers to stay longer, order more and cost less to serve?

In 2020, I set out to study the current state of CX as it's practiced today, to determine what sets those successful programs apart from the rest.

Over the course of the year, my team at Heart of the Customer (the CX journey-mapping consultancy I founded) used both qualitative and quantitative methodologies to engage with more 300 CX professionals, including more than 150 hours of one-on-one interviews and shadowing successful CX leaders at three companies for an extended period.

We also conducted a survey that got to the heart of the challenges CX pros are facing. (Spoiler alert: it's a three-way tie between organizational complexity, not engaging the right people and a lack of leadership buy-in.)

Most study participants led CX efforts within their organizations but we also talked with finance roles, CEOs, marketing and sales leaders and anyone else who could help us paint a complete picture of what was going on in an organization. The key to CX success is driving organization-wide change, so you can't understand CX impact by talking only to the CX team.

The results of this research indicate a pressing need to rethink the way things are done in CX and look past widely accepted truths (including a reliance on surveys) to instead focus on what is actually working in the real world.

Four key accelerators of success

Our research revealed that the very best CX programs – we call them change makers – are doing four things you probably are not. Here are those four accelerators of success:

1). They focus on creating business value.

2). They design journeys to elicit one target emotion to create an emotional connection.

3). They utilize change management principles to overcome inertia and drive organizational transformation.

4). They deploy technology to measure and manage the experience and track the impact of their improvement initiatives.

In other words, the best CX programs start, end and do everything in between based on how their efforts will add value to the business.

So knowing what drives business value is key to achieving this goal.

It's widely understood within (and outside) the CX industry that creating an emotional connection is critical to building customer loyalty (which, in turn, builds business value), but it's hard to measure that intangible – so most companies don't. Instead, they focus on easily quantifiable, though often fiscally meaningless, survey scores.

We found that change makers not only measure positive and negative emotional responses, they go deeper, focusing on eliciting one single emotion, which serves as an emotional North Star across the entire organization. This more nuanced understanding of the delivered experience and customers' response to it drives accelerated improvement and growth by efficiently aligning every team around a shared outcome.

This holds just as true for B2B and B2B2C organizations as it does for B2C, even though people (mistakenly) tend to consider B2B transactions devoid of emotion. The fact is, businesses don't make decisions, buy products or recommend you to their peers – businesspeople do. Whether you're dealing with a mom-and-pop shop or a seemingly impersonal global conglomerate, the decision to spend more with you, stay with you longer and try out your new products is going to be made by a human being governed by emotional responses.

Strongest predictor of loyalty

In their studies of consumer relationships, both Forrester and the XM Institute use variations of the ease, effectiveness and emotion framework when they assess national brands' customer experience quality. Both entities report that emotion is the strongest predictor of loyalty. Yet still, to their detriment, many companies continue to focus on ease and effectiveness.

This leads to a narrow find-and-fix mentality that primarily addresses friction. Doing so might help you prevent disloyalty but it doesn't create the loyalty that leads customers to buy more from you and refer you to others. Focusing on that "third e" by designing to elicit one specific emotion unleashes the potential of an improved customer experience.

Imagine what would happen if you asked each of your executives to design for customer emotions, then sent them back to their respective departments to build a plan. Marketing might focus on trust, so their messaging would be better received. Product might target desire, adding features to differentiate your offerings. Finance might go with simplicity to lower costs and IT might aim for an easy experience (even though those two aren't really emotions) and so on.

None of these goals are wrong in and of themselves but this Frankenstein approach – happening in most companies as we speak – handicaps your efforts to earn loyalty, wastes resources and increases your costs without delivering improved outcomes for your customers.

Now imagine this: Instead of asking your executives to design for emotions, ask them instead to focus on one emotion, such as confidence. While each will still come up with their own distinct ideas for how to execute on that (as they should), their plans will be more aligned, more consistent and more fruitful.

Or say, for example, instead of confidence, this time you ask your teams to design for enjoyability. Creating enjoyability requires a different experience than one that builds confidence. Confidence requires consistently strong outcomes, so customers believe they will succeed when they use your products. Enjoyability speaks more to the power of the relationship and gets your staff thinking cross-functionally about customer needs and, most importantly, how they can go above and beyond to meet them.

Brand identity is another factor that's critical in your

choice. Compare Publix and Aldi. Both are excellent grocery stores but they create very different emotional outcomes for shoppers. Publix, for example, works to create an inspired experience by offering subs with a cult following and cooking demonstrations that Aldi store layouts couldn't accommodate even if they wanted to. On the other hand, Aldi focuses on well–priced quality, driving customer confidence that Aldi has what they want at a price they can afford.

Both companies design for one emotional outcome – just not the same one.

There is no single "right" emotion to measure or manage that will work for every industry or company. But putting in the work to determine which one is right for you and your customers can pay off in myriad ways.

Trust was a leading metric

One of the most powerful examples of the benefit of designing for one emotion comes from the U.S. Department of Veteran Affairs (VA). After a scandal involving extreme wait times for veterans to receive service, the organization created a Veterans Experience Office (VEO) that focused on creating a best-in-class experience. The VEO started to measure veteran experiences through effectiveness, ease and emotion. But as it worked with more veterans and their families and caregivers, it discovered that trust was a leading metric, one it could use to guide all their experiences.

"It was risky, and initially there was pushback for not using a standard metric," says Lee Becker, the then-VEO chief of staff. "Trust is an almost sacred relationship, complex and difficult to measure. We thought, 'Can we really do that?' The key was willingness at the leadership level to take that risk. There was clarity."

In doing so, the VEO found it had improved the most significant outcome imaginable: lives saved.

Veterans as a population have a higher rate of death by suicide than the general public. But now, statistics show that veterans who trust the VA are more likely to use it and veterans who use it are far less likely to die by suicide than those who don't use it. Recently, the VA announced that trust had hit an all-time high, with over 90% of veterans using VA services reporting that they trust the VA.

See results

But the stakes don't need to be that high to see results. Take Hagerty, which has grown from a niche insurance company into an automotive lifestyle brand that is now also the largest specialty insurer in the world, covering everything from classic antique collectibles to today's pricy sports cars.

Hagerty's Vice President of Insights and Loyalty, Nancy Flowers, made the connection between emotion, customer loyalty and financial outcomes when the company began offering roadside assistance to its customers.

It turns out that when classic cars break down, it's a much bigger deal than when it happens to your Honda on your daily commute. So Hagerty designed its roadside assistance program to meet its customers' special needs. And it was a hit – customers provided positive feedback and ratings for the service.

Until they didn't.

When Hagerty changed its roadside assistance partner, satisfaction scores took a dive but no one could figure out why. Calls were being answered in the same amount of time, roadside assistance vehicles were showing up as promised – nothing seemed different.

Then Flowers and her team started listening to the actual calls between the drivers and the roadside assistance provider and something clicked: Drivers did not feel the new partner's contact center employees were treating them with empathy.

We all should hear some empathy from our service providers but for customers experiencing great emotion along with their classic-car breakdown, a lack of empathy was a deal-breaker.

Once those Hagerty customers were again provided with an empathetic emotional experience, customer satisfaction returned to previous levels. This piqued Hagerty's curiosity about what other emotions could be behind survey scores.

"We did a deep dive with our loyal customers to understand our key drivers," Flowers says. "Our customers kept telling us that they want us leaving them happy. So now we measure happiness at the relationship level and some transactions. It is definitely our emotional North Star and is highly correlated with loyalty. The big difference emotionally comes in with transactions. For example, after a claims or roadside incident, we do not measure happiness."

That shows a critical understanding. If a customer's car was just totaled and you ask if their experience has made them happy, all you're asking for is trouble.

Happiness would be a nonsensical goal for most insurance companies but Hagerty isn't just another insurance company and it realizes its customers have unique needs. Importantly, its NPS predicts happiness, which in turn predicts retention. So now, rather than asking teams to design toward a higher NPS score, Hagerty is more successful by telling teams to target happiness.

Connect the dots for leadership

When Roxie Strohmenger, vice president of CX strategy at UKG, started at the global provider of human capital management and workforce management solutions, her first step was to discover how customers felt about their current experience with the organization. She used a battery of 30 emotion options to narrow down the ones that mattered most, then built a system to measure those emotions and design customer experiences to target them.

"I ask about emotions in a survey," she says. "If I could hook up people to get a galvanic skin response, that would be awesome, but this is the only way I can do it."

The next step was to isolate the one emotion that could serve as UKG's emotional North Star. Armed with financial and behavioral data to distinguish success, Strohmenger used a survey to identify which emotions had the strongest impact on loyalty behavior. This approach isolated four loyalty-building and four loyalty-degrading emotions, landing on confidence as UKG's emotional North Star, since that emotion most reliably differentiated loyal customers.

Strohmenger then redesigned her experience measure-

ment, replacing CSAT as UKG's top-level metric to focus on questions measuring the CX quality dimensions of expectations, effort and emotion. She also asked respondents to select from a list of eight emotions they experienced working with UKG.

This enabled Strohmenger to produce far more powerful reporting to help the organization manage customers' emotions – and thus outcomes. Most organizations have reports that say, "The NPS for your product is 20, compared to our overall NPS of 35." Solid data but hardly actionable.

Strohmenger's approach can report (using purely hypothetical figures here): "Overall, 46% of our customers are confident but that's true for only 25% of customers using your product. Worse, while only 15% of our overall customer base is frustrated, for your line, it's 40%."

You'll still want to find out what's driving confidence and frustration but this type of reporting is far more likely to result in customer-focused change.

Unexpected ways

Even at one of the world's largest chemical manufacturers, emotions matter. Jen Zamora, Dow's senior global director of CX and commercial excellence, has capitalized on that in unexpected ways.

I first met Zamora when Heart of the Customer was mapping Dow's complaints experience. She told us her goal was to create a complaints process that was enjoyable.

Um, an enjoyable complaints process? I thought to myself: "Why not just hunt a unicorn?"

But creating enjoyable experiences – every time, not just with complaints – is exactly how the company is differentiating itself. Zamora shared the philosophy behind this approach: "Everybody who transacts business wants an easy and effective transaction and we strive to deliver against that. But when you take it to the next level and understand what makes the experience enjoyable, you start to tap into a different aspect of the customer's psyche. And that's what we've been able to prove out over the last couple of years. Easy and effective are table stakes. But if your experience is enjoyable, nine times out of 10, you're going to go back for the enjoyable experience.

"Such efforts do much more than bring your current customers back for more. They open the door and get you a seat at the table for creating new products together. Innovations with customers is the loyalty gold medal for Dow. It tells us that not only do our customers have confidence in us but that they enjoy the relationship enough to invest in growth together."

Customers self-educate

Early in his CX career, Darin Byrne, vice president of client experience and delivery at Wolters Kluwer Compliance Solutions, wanted to understand how bankers decide on a compliance solutions partner. This work was inspired by a study by the CEB (now part of Gartner Consulting), which reported that 57% of the B2B purchase process happened before a sales representative was involved, primarily through digital channels. Potential customers consult websites and self-educate before ever engaging with a vendor's sales team.

The company began by documenting its hypotheses of the customer buying journey and identifying steps potential customers might take, like reading case studies and reviewing capabilities on websites – digital activities used to decide which products to consider.

Then it interviewed dozens of bank leaders to uncover the real story. It turns out that while bankers did do all the things the internal company team hypothesized, something far more important happened first.

When bankers considered selecting a new partner, the first thing they did was contact another banker to ask which company they trusted. That trust was key to their decision making.

Compliance is critical to lending, so choosing the wrong system can be disastrous. But every company's website claims their systems enable easy compliance, so who can a banker trust? Their peers.

If another banker doesn't recommend Wolters Kluwer Financial Services, they're unlikely to even be in the running. In order to continue its strong growth, the company focused on improving trust with current customers, so they would recommend the company to future ones.

Eminently replicable

One of the most uplifting findings of our research is that change makers' success is eminently replicable. There's no need to keep blindly throwing initiatives against the wall to see what sticks or spinning your wheels measuring outcomes that don't capture your leaders' attention.

Identify the journey (or journeys) that matter most to your most important customers. Explore the emotions your customers currently experience and pay attention to your customers' goals. (What is your customer trying to achieve in this journey? What emotions do you want your customers to feel during this journey?)

To select one top emotion, review the reason why your company wants this customer to have a successful journey. The North Star emotion that you choose should lead the customer toward your company's goal.

Just know that you can't create these strong emotional outcomes through one-off or occasional work. You'll need to apply change management principles to rally the entire organization and utilize CX technology to measure and manage journey improvements.

Nonetheless, having an emotional North Star will point the way to sustainable growth and profitability for the business, increased success for your CX team and optimized experiences for your customers.

Jim Tincher is founder and CEO of customer experience firm Heart of the Customer. He can be reached at jim@heartofthecustomer.com.

••• customer satisfaction research

Outlasting the fads

A longitudinal view of satisfaction research

| By Doug Berdie

snapshot

Doug Berdie offers up lessons learned over 45+ years of measuring and investigating customer satisfaction.

In the past year, I've reviewed accumulated knowledge obtained over 45+ years as a customer satisfaction researcher/consultant. This review covered reams of data collected from small to Fortune 50 companies across dozens of industries, from business customers as well as customers of government and non-profit services, from customers in the supply chain as well as end-use consumers. Fads related to customer satisfaction have come and gone during that time and even some of those that have been discredited due to solid research analysis persist. The key insights I've obtained are summarized below.

Proven techniques exist for assessing how well your customer satisfaction measurement system serves your organization. A good starting place is to ask the following questions – each of which points to uses of time that could be better devoted to actually improving customer service and satisfaction:

- Do your employees spend time devising ways to artificially inflate their customers' satisfaction ratings?
- Has your organization created integrity-check systems to prevent fraudulent ratings (e.g., verifying e-mail addresses of raters to ensure the ratings come from real customers)?
- Have your statisticians cornered you into using analytics which are so hard to understand that no one pays much attention to your survey results?
- Does your organization have a general sense of what needs attention (e.g., faster payment of invoices by customers) without having the actual details needed for improvement (e.g., ensuring that the purchase-order number appears clearly on all billing statements)?
- Does your organization know what your competitors are doing effectively to address the types of problems voiced by your customers?

People often have a fuzzy, inaccurate notion of what really influences their behavior.

The single most important reason an organization should collect customer feedback is to stimulate the company to improve its products/services so they best meet the needs of its customers. Doing so will lead to increased satisfaction and enduring loyalty from customers. I highlighted in a 2016 Quirk's article ("A better use of your time") how Brock White construction supply company did this successfully for over 20 years. Merely tracking numbers (such as the once-touted Net Promoter Score) to report on monthly/quarterly/yearly scorecards does not provide effective insights on the needed details of organizational performance. Further, doing so can deflect attention from more meaningful activities.

Many things affect whether a customer is loyal over time and whether they pick an organization for specific purchases. Past performance of the organization is one of the reasons (and not necessarily the most important). Stocking the exact product/service desired; how long it takes to get that product or service; price compared to other options; and speed and ease of getting an order placed are just a few obvious factors that, if unacceptable, will prevent orders – regardless of past customer satisfaction.

There is usually a strong relationship between a customer's overall satisfaction rating and that customer's "likelihood to buy again" rating. For example, in a typical large-scale, nationwide program, a 4.5 overall satisfaction average (on a five-point scale) generated a "definitely will buy again" response. But, as noted below, none of these general questions predict purchase behavior very well.

"Willingness to recommend," "overall satisfaction," "likelihood to buy again" and other similar "one-number" indices do not effectively predict sales, repurchase or other profitability results. One reason is the effect of the above-mentioned, specific-purchase-related factors that play major roles in buying decisions. In a three-year customer satisfaction program for an equipment manufacturer, we found that those customers giving a 10 or 9 (i.e., top-two box) response to a 10-point overall satisfaction question actually repurchased at lower levels than average across the entire customer base. This occurred for both post-sales and post-service surveys. The same thing was found in many other surveys. And, common-sense overall measures perform no better than the standard ones. I created a "totally satisfied" single number (called TOTSAT) whereby customers who were either satisfied or very satisfied with the aspects of their experience they deemed most important were labeled totally satisfied and anything less than this was labeled not totally satisfied. The correlation of this measure to subsequent sales (as reported in the 2016 Quirk's article cited above) was so close to 0.00 it amazed me. But it was instructive! In fact, there are numerous studies that have shown, for example, that stores that achieve stronger financial results tend to be those that earn weaker customer satisfaction ratings. So it's foolish to assume that raising scores will, necessarily, improve financial results.

Actual recommendation behavior predicts future purchases better than stated willingness to recommend. This is not surprising because what people have actually done is generally a good predictor of future behavior. Hence, if a "recommend" question is to be asked, it should be asked in the form of, "Over the past [some given period of time], how many times have you actually recommended [name of organization] to friends or colleagues?" A related research finding is that people often have a fuzzy, inaccurate notion of what really influences their behavior. So, merely asking why they bought or did something does not reliably yield accurate data in some cases.

Customers who are very satisfied often do

differ from those who are very dissatisfied – i.e., the extremes do make a difference in future purchases and loyalty. For example, our finding in one study was quite typical in that those who were very satisfied showed a range of 39% to 100% purchase increase in the following three months vs. an 11% to 54% decrease among those who were very dissatisfied. Approximately the same size difference existed for each of the four consecutive quarters in which it was examined. In another typical study, quarterly sales (compared to the previous quarter) for dealers with low end-user satisfaction scores were 99% of the previous quarter, compared to 139% for those with highest satisfaction among end users.

Dealers who participate in manufacturer-sponsored customer feedback programs tend to see better sales increases and satisfaction scores than those who do not participate. Just "doing surveys" is not likely the key driver of this difference, as my experience has been that it is the top dealers who believe in participating in many manufacturer-sponsored programs, and their sales increases likely are a result of their overall enthusiasm to do so. Even though they started at about the same level, customers of dealers enrolled in a nationwide manufacturer's program showed a 71% "VS+S" (i.e., top-two box) score compared to 29% "VS+S" of customers of dealers not enrolled. Again, it's tempting to conclude that enrollment by itself caused this difference but that would be speculative given the overall differences in attitudes/behaviors of the two sets of dealers.

Many (if not most) customer satisfaction measurement systems no longer follow the basic rules needed to obtain reliable, valid data. When these programs first started, great attention was paid to: measuring a representative group of customers; using extreme care to word questions in an unbiased manner; obtaining high response rates; and using careful analytical techniques. At one point, contacting masses of customers who'd sent in warranty cards became vogue (and inexpensive), then flooding surveys over the internet to most (if not all) customers who could be reached started and recruiting customer panels followed as well. Not much attention was paid to proving that those being surveyed were truly representative of a defined customer base. Compounding this shortcoming is that minimal attention was paid to obtaining a representative response rate and almost no effort is made to find out why people were not responding. Given this poor statistical practice, to cite data precision numbers (such as saying, "Overall satisfaction is 4.1, plus/minus .2") is not only incorrect but it also misleads decision-makers.

> One simple, proven way to improve satisfaction and organizational effectiveness is to simply contact dissatisfied customers and ask them to detail the specifics of their dissatisfaction.

Once organizations realize that simple, "overall satisfaction" numbers (in whatever guise) are not particularly useful, it frees them up to put customer feedback to effective use. One simple, proven way to improve satisfaction and organizational effectiveness is to simply contact dissatisfied customers and ask them to detail the specifics of their dissatisfaction and to suggest ways the system could be changed to serve them better in the future. Another effective method is to abandon the one-question survey approach and return to a survey with a limited number of more detailed satisfaction questions (e.g., satisfaction with the ease of placing an order). Again, when dissatisfied customers are identified by this method, they can be recontacted to get details and suggested improvements. And, as described in the Quirk's article mentioned above, assembling "customer councils" for in-person discussions is an extremely effective method to maximize organizational performance and, by extension, customer satisfaction.

Key for success

Staying in touch with customers so methods can be uncovered to ensure they are best served meets everyone's needs – and is a key for organizational success. However, merely implementing overly simplistic customer satisfaction surveys, such as those with one question, has a poor history of meeting that objective. The more sincere methods used by successful organizations do, indeed, find ways to best meet customer needs and those methods should be copied by other organizations.

Doug Berdie is president of Consumer Review Systems. He can be reached at dberdie1@msn.com.

••• customer experience research

Investing for dividends

A portfolio approach to customer experience intelligence

| By Jeofrey Bean

snapshot

Incorporating thick data with other sources can help you understand how your customers think and feel about your company.

With so many choices of data and other types of inputs available for developing customer experience insights, it can be challenging to explain to clients or employers how inputs can be used together to create effective customer experience intelligence (CXI).

Working with business and health organization clients and teaching customer experience leadership at UC San Diego Extension, I've found a portfolio approach to customer experience intelligence to be an effective way to explain it and to improve the acceptance and quality of customer experience intelligence and related decisions. I hope the approach explored in this article will help you do the same.

An inside track

Time after time the customer experience leaders – small or large, business-to-business or business-to-consumer – seem to have an inside track to customers and the experiences they want. How do they do it? It's not by accident. Most of the leaders have repeat success stories of determining, developing and delivering customer experiences that inspire people to advocate for them.

Is it some secret intelligence available only to these CX leaders? Partly yes and partly no. Yes, because companies have their own qualitative and quantitative data views just from being in business. No, because some of their methods of gathering customer experience intelligence can be used by almost any business.

These intelligence-driven customer experiences effectively make companies with well-developed and -applied CXI better and different for customers. They increase revenues and profitability with improved customer retention, double-digit customer advocacy rates and declining cost of acquiring new customers. These are just some of the hallmarks of a CXI-centric business. CX leaders are committed to defining multiple inputs that feed their portfolio of information that is converted to customer

advantage as they can learn this when using customer experience intelligence to help determine and develop what the experience *should* be.

Being practical, all businesses have constraints of time, money, customer dynamics and the ability to transform information into insights for decision-making. So, what are the minimum types of intelligence we should know about each interaction a person has with the company to make effective decisions?

That minimum is the customer experience four or CX4. The CX4 are the leading indicators to be understood for each interaction a customer has with the company, on the internet or off, from the time a person has their first interaction and discovers the company to when they might be an advocate. With accurate information about each one of the CX4 from various types of customers, decisions on improving or innovating specific interactions become more successful.

The CX4:

1. **The value of the interaction – how valuable was it for the customer?**
2. **The range of emotions people experience during an interaction.** Having positive emotional outcomes may be the most critical factor in securing the ultimate value in a consumer or business relationship. As explained by Don Norman, author of "Emotional Design: Why We Love (or Hate) Everyday Things," "It is all about the emotions you have. More important than the emotions you have … are the emotions that you remember. How long is the experience? It is an instant. It goes away. But in our memories, it is forever. And so it is much more important that people walk away with positive impressions, feeling good." These feelings will weigh heavily in deciding whether to have that interaction again.
3. **Customer perception of how the interaction used their time.** When customer time and company time are aligned it increases the likelihood of repeat purchase and formal or informal customer advocacy.
4. **The do-for/do-to effect.** No matter what type of interaction people have, they are concerned about what it does *for* them or what it does *to* them. This is an instance where there is usually no middle. Listen to some people describe their past or anticipated interactions with their cable company or bank and it becomes evident that do-to is dominant. Customers of USAA, Workday and TurboTax (Intuit) tend to recount or anticipate their interactions more on the do-for side. In our book, "The Customer Experience

experience insights. These insights enable effective customer experience decision-making.

Transformed into insights

What is customer experience intelligence? CXI is the cultural and systematic combination of internal and external inputs from customers about all the interaction experiences they have with your business, on the internet and off, directly and indirectly. These inputs are then transformed by the company into insights that are prescriptive and predictive, resulting in effective decision-making to improve and innovate the customer experience.

It starts with developing a deep understanding of customers in a professional and personalized way, going beyond the traditional customer profile for your product or service. This deep and contextual understanding allows you to apply the ingredients of customer experience (including your messages, people, processes, technologies and products and services) in a way that the customer adopts your company's people, products and services as their own, integrated into their life and their business.

I have worked with many businesses that do not understand the real experience their customers have with most or all company interactions. An internal and external view is needed. It has been extremely helpful for many businesses to start by creating a specific internal view of what the customer is experiencing at every interaction. We start where they discover the business, through all the interactions of becoming a customer, including buying again, interacting with customer service and, in the best cases, becoming an advocate. The next stage is to define and evaluate the external customer-based view of their interactions with the business based on customer experience intelligence.

Before you begin, it is important to decide what are the minimally acceptable categories of information about each (and all) interaction(s) that are likely to be insightful for decision-making. New businesses have an

Revolution – How Companies Like Apple, Amazon and Starbucks Have Changed Business Forever," my co-author Sean Van Tyne and I wrote that do-fors, "are what products or services actually do for customers that they highly value. They answer the questions: What will that do for me? and Why should I care? Delivering the do-fors well with an extraordinary customer experience can create advocates and additional revenue."

The minimum set of dimensions for each interaction can vary by industry. For example, in health care (Figure 1), the minimally acceptable categories of information about interactions are likely to include a fifth leading indicator: physical experience. Be mindful that too many dimensions can make the process unwieldy, particularly if you only have the chance to have a single look.

Think what finished for this stage means to you. Potential information inputs into the CXI or patient experience intelligence (PXI) portfolio will be discussed later in this article.

Continuing to build your model, add words and number ratings from an internal perspective for the CX4 or (or in the case of a health care example, the patient experience five or PX5) about each interaction. Compare the results for internal and external. Where are there differences and why? Where do the internal and external views align well?

Flow of insights

Insights allow you to make better, more effective customer experience-impacting decisions. The aim of customer experience intelligence is to have a flow of insights that allows you to improve existing interactions and anticipate and innovate new ones. Over time your goal is to be able to predict customer behavior. But where does customer experience intelligence come from?

Basically, customer experience intelligence comes from unbiased information inputs from customers and select company resources about customer interactions with a company. The data, words and observation inputs are analyzed specifically for insights that will help make effective decisions to improve or innovate the customer experience interactions and strategies for those customers.

There are businesses that think numbers and words from or observations of customers do not need interpretation to create insights or they leave the interpretation exclusively to computers. While it is fine to use automation for a portion of your analysis, it takes thoughtful, objective human input along the way to give the context of the human experience to the insights. In turn, this helps improve the effectiveness of the decisions based on CXI about interactions and determining new customer experiences likely to

Interaction name		Discovery						Advocacy
Interaction number	>	1	2	3	>>>	13	14	15
Off Internet	Interaction description (what is customer doing?)/ interacting with?						Receiving injection at doctor's office	
On Internet	Interaction description (what is customer doing?)/ interacting with?							
CX4 or PX5 Leading Interaction Indicators								
1 Value to Customer 1 to 10	Rating number						8	
	Words Top 3 to 5						Quick pinch	
2 Emotional Range 1 to 10	Rating number						2	
	Words Top 3 to 5						Nervous, concerned	
3 Use of Time 1 to 10	Rating number						8	
	Words Top 3 to 5						Last treatment	
4 Do For - Do To 1 to 10	Rating number						9	
	Words Top 3 to 5						Finally finished	
5 Physical Experience 1 to 10	Rating number						10	
	Words Top 3 to 5						Pain free	

Figure 1: A partial view of the customer, client, guest or patient journey experience evaluation template tool. What will "finished" look like at this stage? The blank spaces will be filled in with words and data from CXI/PXI inputs, as in patient interaction number 14 in the chart. The completed journey evaluation, based on inputs (findings) will be the basis of an end-to-end patient experience assessment specific to one patient type.

create advocates.

At experience-maker companies, this process is ongoing and is combined with the day-to-day activities and the experiences people at the company have for fixing, improving and innovating customer experiences.

Like an investment portfolio

A group of carefully selected quality inputs from customers, users and influencers is the basis for good customer experience intelligence and resulting insights and decisions. This is a portfolio approach somewhat like an investment portfolio. The value or equity from the different inputs will be created when insights are created to guide decisions to fix, improve or innovate customer interactions or to determine what the experience should be. It may take some testing to get inputs (a hybrid, not a mongrel) in the portfolio that complement each other and allow the creation of valuable insights.

The success of the group of inputs

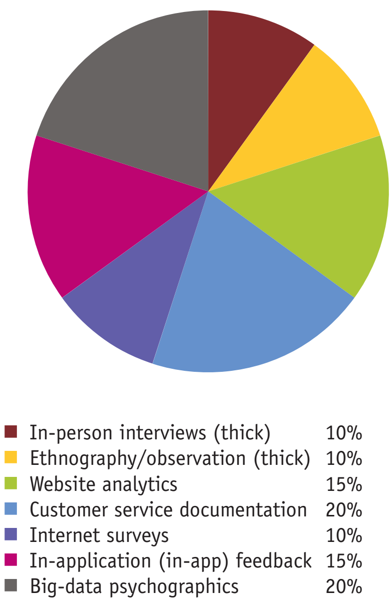


Figure 2: An example of the sources of inputs that can be included in the customer experience intelligence portfolio. Having thick data from inputs like in-person interviews or ethnography is an important partner with other input types for adding human depth and context to insights from the CXI portfolio. The project for this example found that thick data accounting for approximately 20% of the portfolio insights improved the effectiveness of the customer experience intelligence from it.

depends not only on their quality but also on how well the insights are derived and the willingness of your organization to change and take action. Emmy-winning actor Alan Alda, now a podcaster and founder of Alda Communications Training, has a definition of listening that offers tremendous meaning for organizations working with customer experience intelligence: "I have this radical idea that I'm not really listening unless I'm willing to be changed by you."[1]

Consistent and dynamic

Leading-edge companies have integrated the flow of customer experience intelligence in a consistent and dynamic way. It is part of how they work and what makes them successful experience-makers.

There are many input methods a company can choose from to understand customer experience. Selected methods need to blend with the culture of the company as well as fit with the budget and other resources available. Yours can include listening, watching and accumulating qualitative and quantitative data. Unless your organization is willing to be changed and improve customer interactions from the insights that come from the process, you aren't really listening to customers and can't improve and innovate their experience with your company.

Whichever information sources you select to stay smart about customers, be sure to include those that give you a powerful combination of practical and innovative insights into the context of the multiple ways that people experience interactions.

That means including thick data. Thick data is information that comes directly from humans, with nothing in between. It is a focusing lens when properly combined with big data, internal data and other data not gathered directly from people. Thick data adds important context about how people experience interactions. It can help make information that is gathered about people, both qualitative and quantitative, relatable to humans.

Sources of meaningful thick data include in-person interviewing of people (not to be confused with surveying), careful and ethical observation (also known as ethnography) and focus groups. It starts out typically as qualitative and can have quantitative attributes attached to it.

Non-thick data source examples include: online surveys; telephone interviewing; paper-based and internet surveys; web site analytics; customer support and customer service documentation; in-app feedback; customer idea portals; customer relationship management and customer experience management software systems; artificial intelligence; machine learning; data from the Internet of Things; internal data; predictive analytics; unstructured data; dark data and more.

Tricia Wang, an expert at developing business insights and effective results with ethnography and a fellow at Berkman Klein Center for Internet & Society at Harvard University, defined thick data in her landmark speech, "The Human Insights Missing From Big Data," as "data from humans, like stories, emotions and interactions that cannot be quantified," adding "… it comes in the form of a very small sample size but delivers an incredible depth of meaning."

Thick data combined with other types of data such as big data or internal data is the concentrate that helps make resulting insights and decisions more effective than big data or internal data alone. Wang emphasized this point, saying, "Thick data grounds our business questions in human questions and that's why integrating big and thick data forms a more complete picture."

Thick data does not need to be large in scale to ground other types of inputs in the context and depth of a human experience. Think of it as a potent seasoning to be considered with other data and insight creation. High-quality thick data makes its contribution when it is objectively integrated with these other types of data to help give insights in a combination that includes context and human dimensions such as emotions, do-for, do-to and the perception of how time is used in an interaction.

Only a small subset of the companies that use thick data combine it with non-thick data types to get highly

effective customer insights to their decisive advantage. Thick data needs to be added to effectively understand these attributes and others that are vital to the human experience. Integrating thick data with other types of information increases the likelihood that a more exacting narrative pattern or set of insights will be revealed, answering the question: What's the story (and outcome) with this type of person and that interaction? And why? By including thick data, the narrative pattern will reveal points and insights that otherwise would be missed.

Create insights

The goal of transforming customer data, words, visuals and other inputs is to create insights. Insights might stand alone as the basis for decisions or they might be combined with the decision maker's prior experience and innovation success for effective customer experience decision-making.

Ultimately, with a combination of thick data and non-thick data inputs about customer interactions flowing into the company you will have insights to help people at the company make effective decisions about the interactions that make up customer experiences.

A CXI portfolio rooted in but not limited to the customer interaction level will create insights for customer experience strategies too. New input sources will continue to be discovered and tested. For example, the qualification and quantification of text that people put into social media text analytics.

Many companies have their CXI processes assisted by automation for efficiency but for learning and for quality assurance, people need to be involved in most parts of the transformation, from inputs to insights stages, so that human attributes are not lost. If the process is left completely to machines, much of the value of thick data will be filtered out.

Organizations with continuous, real-time experience intelligence inputs that can quickly transform the inputs into insights, recommendations and actions will create customer experience leadership for their businesses.

Some organizations are there now. They represent the leading edge of CXI by combining big data, internal sales data and customer-specific information anchored by thick data. Those inputs are transformed in a timely way into customer experience improvements and innovation. What these companies have in common is a culture of customer experience. If we were to go into these firms, we would find many variations in the kinds of customer experience inputs they use, how they anchor the input portfolio with thick data and how they transform inputs to insights and insights to recommendations and actions. But the businesses share a commitment and urgency to improving and innovating customer experience with dynamic customer experience intelligence. These organizations also use customer experience intelligence for developing experimental interactions and new customer journeys.

Many customer experience intelligence leaders have their inputs and processes for insights and actions so well-tuned and so well-timed that they've gone beyond persona profiles to innovate customer experience at the individual level. This type of intelligence can be inspirational as a palette of knowledge for innovating messages, products and services that will please the individual with an experience in unexpected ways.

Whether digital or analog, each interaction of a customer journey can produce qualitative and quantitative information and insights. In several cases, they are accompanied by information about specific personas, including the probability that the persona would proceed to the next interaction in the customer journey as well as the likelihood the customer would advocate based on that interaction.

You are doing it

Whether you are just beginning to transition data and words into insights or are a company that represents the customer experience intelligence of the future, the important thing is that you are doing it and it is effective for your business and for your customers.

If you want to bring the advantages of competing with customer experience to your organization, think about where you are now with customer experience intelligence and then carefully and thoughtfully develop the definition of next-generation customer experience intelligence. Whether it's a two-input method to test or you have the good problem of transitioning a well-running customer experience intelligence method from low-frequency contribution to the business to a more dynamic and consistent go-to contributor to decision-making, it's important that the quality of your customer intelligence is in the hands of people who genuinely care about the experiences people have with your business.

Jeofrey Bean is the principal of Del Mar Research and Consulting and is an adjunct professor at the University of California San Diego Extension. He can be reached at jbean@delmarresearch.com.

REFERENCES

1 "Alan Alda would like your attention," Washington Post, March 12, 2020.

brand research

Design (re)thinking

Case studies in merging design thinking and insights communities

| By Scott Lee and Marcus Lui

snapshot

The authors draw from several Asia-based examples to show how brands can achieve customer centricity in a VUCA world.

COVID-19 caused huge disruption to our lives, forcing us to work, school and shop from home. With survival our first priority, many of us changed the way we go through the day, addressing deep personal tensions and reimagining our relationships with people as well as brands. The pandemic has reset the way we seek and achieve happiness; redesigning our lives for greater resilience, seeking wellbeing, getting closer to nature and so forth.

The world is still speculating on whether these new priorities and behaviors might change for good or return to pre-pandemic times. Acting as a tailwind, the pandemic has accelerated existing trends and influenced new ones. What is clear is that we now live in a more VUCA world: more volatile, more uncertain, more complex and more ambiguous.

Digital now permeates all aspects of our lives. It can no longer be ignored by brands or researchers; indeed, it feels like even the most mundane products now come with embedded software (the so-called Internet of Things). This software world affects both the products we buy and the ways we work. Moreover, it increases data sources available to brands. Yet, in some ways, the more data brands collect, the less they seem to understand consumers as real people.

A new normal has emerged, whereby consumers expect to have their cake and eat it. We refer to this as "bothism" – consumers expect great convenience and great experiences. More than this, they want brands that they can identify with, that share their values and offer human interaction at scale.

From a commercial perspective, this means development cycles are getting ever faster and more agile. In an increasingly software-driven world, everything starts to behave like a perpetual beta app, with continuous updates and mounting pressure to stay sticky, to be relevant to consumers. Banks, insurers, airlines – you name it – it's no surprise many are asking: "How can I gamify this?"

Continued erosion

From a market research perspective, this VUCA world has caused the continued erosion of in-person, offline methodologies, as well as challeng-

users and consumers. Design thinking tasks itself with giving people greater agency to shape the products or experiences in their lives, while insight communities, especially in a branded context, aim to give people more say in how their ideas and feedback shape brands.

Building true dialogue

An insight community is an online platform where people are invited to participate in a brand's research activities. They come in different shapes and sizes, ranging from pop-up communities of a few weeks to ongoing communities with thousands of customers. They look and feel like a social media site, which is key to building true dialogue, trust and openness. That's because a community is more like an ongoing relationship, a two-way interaction, compared to the "single date" of traditional research projects.

While communities were originally used for qualitative exploration or quantitative validation, lately some platforms have started to fuel both qualitative and quantitative research. As such, insight communities evolved into a hybrid methodology that can provide a 360-degree view on consumer needs, frictions and aspirations. The tool has proved to be a popular way for brands to stay close to their consumers, prospective customers or even colleagues, especially during the pandemic, when markets and categories have been shifting dramatically.

More than any other methodology, insight communities now offer an always-on window into consumers' lives, a space to meet in their natural habitat, to capture moments of truth as they happen, to get broader and deeper contextual insights. They allow brands to collaborate with consumers over longer periods of time, facilitating iterative, longitudinal research – and with a diverse variety of people. As such, community members can have different profiles ranging from everyday consumers to trendsetters and even creatives, who help brands to not only unearth insights but also foresights and creative breakthroughs.

Gaining mainstream attention

Design thinking is not a new concept. Attempts to develop the science of design first appeared in the 1960s, in an effort to align stakeholder interactions with technology. Since then, design thinking has been earning mainstream attention and adoption across businesses, institutions and even marketing research.

Design thinking is in essence a human-centered problem-solving approach that has gained traction in many companies recently. It helps to

ing the research project mind-set. Discrete research projects, with binary step-wise methodologies of "qual then quant" or "quant then qual" are struggling to keep up. Hard-grafting researchers will burn the midnight oil to try to duct-tape the old paradigm together. But for how much longer?

Beyond agility, there is a deeper issue for traditional research; focus groups, for example, are arguably becoming out of sync with the ever-empowered consumer of today. Certainly, for next-gen consumers under 30, brands must engage in their (digital) world to avoid losing relevance and falling behind.

Arguably, there are even cracks in the burgeoning multimillion NPS software industry; how effectively are we listening to consumers by repeatedly (and a bit desperately) asking them whether they will recommend us? As response rates turn south, some management consultants are questioning the efficacy of these scores.

It seems that since the pandemic, brands are experiencing a consumer-centricity gap; lacking in empathy, lacking effective collaboration tools and lacking the ability (or willingness) to listen.

Make it matter

So, how do we best harness digital to stay fast and agile, to engage consumers continuously but with the necessary depth of insight and breadth of validation? How can we create the necessary shift from a research project mind-set to continuous innovation? How can we humanize market research and make it matter to people through mutual trust and shared understanding?

Around three years ago we witnessed a spark between design thinking and insight communities. Through the pandemic we have experienced a deepening of this trend with different clients, with insight communities becoming a supercharged medium for the application of design thinking.

Certainly, the two share synergies that differ from traditional research. Practitioners of design thinking and insight communities both have a passion for a more human approach to research and have long espoused the need for greater authenticity and transparency in the way we engage align stakeholders around an empathy for users' challenges. By harnessing an iterative process of divergent and convergent steps, the classic Double Diamond model, it involves stakeholders and users in the journey of solving the right problem in the right way.

As an approach it has also seen a surge through the pandemic, not least because it underpins many of the ways of working in UX and digital innovation. As the importance of digital grows, so does the prevalence of design-thinking practices.

More fundamentally, design thinking helps brands navigate ambiguity and complexity by deriving patterns from complex data sets to define problems to solve. It also fosters interdepartmental collaboration and ensures consumer centricity of solutions at every step. Like communities, it helps to make your brand VUCA-proof, not by relying on the past to extrapolate to the future but ensuring through exploratory research we are ensuring "doing the right thing" before "doing it right" by embedding validation research.

Solve a challenge

Around three years ago in Asia (in the days we were still ABN Impact), we saw an opportunity for design thinking to solve a challenge we faced with our insight communities. In principle, a community brought lots of great insight tools into one place with a group of highly engaged consumers. In effect it was an all-you-can-eat insight buffet.

Unfortunately, clients in Asia were not used to buffets, they were more inclined to enjoy discrete, a-la carte research projects. While UX researchers in digital teams had the muscle memory for agile, insights teams did not have this habit for iterative and continuous learning. Moreover, the heritage for research generally in Asia was a heavy diet of validation research. Encouraging clients to step back and use more explorative research first was also a fundamental challenge.

We had the community tools or hardware but in a sense not the software to enable iterative research with clients. The insight community as a methodology on its own didn't help clients to frame the problem strategically nor did it drive the actionability that was needed.

It was also clear that while design thinking was gaining popularity, it fell short on the issue of scalability. Traditional design thinking relied heavily on in-person ethnography and multiple stages of face-to-face workshops, in-person product or UX tests. It often felt long and laborious. It wasn't unusual for people to start applying the design thinking badge to any project, while ignoring the rigor of a full Double Diamond approach.

Clients needed more efficient and scalable ways to practice design thinking, while the pressure was on for insight communities to show they could drive greater strategic intent from insights.

As a result, we started exploring how to apply design thinking principles to clients' insight community activities and research roadmaps. By doing so, we also hoped to raise the profile of both methods within our clients' organizations, improving the standard of insights for them in the process.

Change the ways they worked

Today around half of our business in Asia is with financial service clients. Even prior to the pandemic we were seeing a growth in these and other service industry clients leveraging design thinking. As digital practices increased, marketing teams were seeking to change the ways they worked and a new language was slowly emerging around customer insights. Here are some recent examples.

Asia Miles rewards program at Cathay Pacific

Closed-loop continuous innovation, integrating content directly from members

Asia Miles uses an always-on community of around 10,000 members with whom we conduct a variety of qualitative and quantitative activities. The community is an intrinsic way of engaging members on core initiatives and has visible endorsement from the CEO.

Some time ago we started to bring design-thinking principles to the research programs on this community. In one instance, we used a sequence of activities to help design the new Asia Miles dining rewards pillar. We went from exploratory activities on the nature of dining out to defining the pains in the journey of earning miles in restaurants, before moving into prototyping and testing a new Asia Miles dining app.

The iterative nature of the research led to many changes in the dining program, from the marketing, a special members'-choice program (of restaurant) to significant new partnerships with local food and beverage search sites like OpenRice – culminating in three times more accruals of miles through dining.

In addition to closing the loop from development through to testing and tracking of initiatives, we also opened the door to engaging members themselves for content. Exploratory research identified the need for real Asia Miles member stories (rather than key opinion leaders) to inspire and educate less-savvy members on how to get the best from the program. Subsequently, we sourced real community member stories and created content of a select few to embed on the member website.

L'Oréal Hong Kong

Stepping back to define challenges through true consumer empathy

L'Oréal has an always-on insight community of 2,000 Hong Kong consumers which is home to weekly online and offline insight activities. In addition to regular tactical activities, we also introduced a design-thinking process, which encouraged the team to step back and empathize with consumers' perspectives around personal subjects like sensitive skin.

Following a mixture of profiling surveys, mobile ethnography and one-on-one interviews, members of the community who suffered from sensitive skin conditions were invited to join the client in a co-creation workshop. The client discovered a consumer journey with sensitive skin that descended into a feeling of helplessness. Sufferers were unable to find the right solution and struggled to define the problem with their skin.

Asking client stakeholders to prioritize consumer problems as "how might we" opportunity statements created

that crucial feeling of empathy that switched the team's way of thinking to, "How might we make it easier for sensitive skin sufferers to understand their skin?" Subsequent digital solutions focused more on helping consumers diagnose their skin issues.

This was also an apt metaphor for how to tackle research projects with a design thinking mind-set, to spend more time understanding and defining the problem instead of jumping to the recommendation or solution.

HSBC Indonesia

Supercharging design thinking to build new banking propositions

HSBC needed to develop more relevant ways to position both its Advance and Premier solutions to consumers in Indonesia. In the midst of the pandemic it turned to its structural insight community of 1,200 customers.

We conducted a series of activities including online surveys, forums and immersion sessions with both Millennial and mature customers from their insight community. For each Advance and Premier banking segment, we developed a set of personas articulating their true money mind-sets and potential opportunities.

Through interactive digital workshop sessions with various stakeholders within HSBC (i.e., the product team, marketing, sales, digital, service and many more), we were able to connect the client to these consumers, bring the personas, their insights and resulting "how might we" opportunities to life before guiding ideation and proposition development.

This combination of insight community and digital workshops supercharged the design-thinking process, bringing exploration and validation steps together with greater agility. Despite the challenges facing Indonesia through the pandemic, HSBC recorded one of its most successful Premier campaign launches ever.

Bupa Hong Kong

Design thinking brings strategic perspective to journey mapping on communities

In adjusting to a new normal, many Hong Kong people have had to make changes in their lives, including their insurance and health care service needs. To keep centered on the customer throughout this period of digital transformation, medical insurance company Bupa HK worked with us to establish digital journeys across the entire customer lifecycle.

The critical step on this program was at the very beginning, conducting a digital workshop and online stakeholder interviews to map out the lifecycle. We were able to structure and prioritize the need for multiple digital journey investigations across it.

Bupa was then able to harness the structural insight community of its customers to embark on a program of multiple journey investigations, including zooming in and out of macro journeys, micro journeys and lifecycles.

Standard Chartered Bank Singapore

Optimizing the CardsPal app through community experiments

When new Singaporean regulations made it easier to aggregate banks' products and services in a single app, Standard Chartered took the opportunity to develop CardsPal, an app that helps users find credit card deals to maximize savings on shopping, dining and more.

We conducted research in Singapore to prioritize the launch for CardsPal. Using an insight community over several weeks, we were able to understand the context of users' current credit card behavior as well as test the beta version of the new CardsPal app.

First, we used forums to explore users' needs and existing perspectives. Then a series of asynchronous tasks were launched on the app. We also conducted one-on-one standard UX interviews with screen-sharing and a think-aloud protocol to drill into specific issues.

Prototyping and testing is at the heart of design thinking. An insight community is a great place to experiment with prototypes or conduct UX testing in many different shapes and forms, in an iterative way, throughout the development cycle. It also overcomes one of the core challenges of UX testing, namely, finding profiled users at speed, where you can conduct multiple UX approaches in one.

Increasingly relevant

In today's VUCA world, the customer-centric approach to problem-solving that design thinking affords is increasingly relevant for brands and businesses. It enables agile and iterative solution development throughout the innovation process, it prioritizes challenges to optimize resources and it defines appropriate performance criteria for better impact measurement.

In recent months, it has undergone a digital makeover. By integrating design thinking with digitally enabled customer engagement and insight tools such as insight communities, brands can expand their market research to gain broader user empathy. The integration of these tools affords a continuous window into the lives of consumers; greater exploration, iteration and validation throughout the research; and better impact measurement.

Ultimately, a digitally-enabled post-pandemic version of design thinking (we're coining the term design re-thinking!) is helping brands organize themselves to better enable the continuity of the consumer learning process – notably the awareness, understanding and application of user insights – and completing the innovation loop through definition of performance measurement of solutions.

What's clear is that insight communities are moving beyond just being a new vehicle or tool for research. They have, alongside the growing influence of design thinking in business, become part of a whole new mind-set and approach to insights.

Scott Lee is managing partner/senior client partner Asia at research firm InSites Consulting. He can be reached at scott.lee@insites-consulting.com. Marcus Lui is strategic consultant service design at InSites Consulting. He can be reached at marcus.lui@insites-consulting.com.

••• advertising research

Putting the audience first

Maximize the impact of your TV campaign with audience-based buying

| By Danielle Delauro

snapshot

Danielle Delauro offers tips for getting your organization started with ABB.

When I worked at an ad agency in strategic planning, there was one client in particular that would often share fresh proprietary insights on its customers. I always appreciated this, as the richness and depth of these kinds of findings would bring an enlightened perspective, providing a new level of intimacy and vibrancy to our understanding of the people who made up our target customer base.

Of course, the client would share these learnings in order to help us refine and strengthen our communications plan. And the insights helped us in virtually all components of our strategic thinking, with one glaring exception, which happened to be the one area that was the client's single largest investment: television advertising buying. My client's in-depth customer profile was distilled down to a generic "female 25-to-54-years-old" demographic.

Thankfully, the TV advertising landscape has significantly evolved since then, with advances in technology and targeting strategies that are now available. Today, those same customer insights could fuel a powerful, comprehensive audience-based TV buying approach.

TV advertising is at an inflection point as the practice of audience-based buying (ABB) is moving beyond early adopters. So, if you're a marketer or researcher, how do you equip yourself for the present and prepare for this future? The first step is to know what exactly audience-based buying is.

Wherever and whenever

Advances in technology and measurement now allow marketers to target and buy multiscreen TV ad campaigns against specific audiences such as lifestyle characteristics (e.g., homeowners, new parents) and purchase behavior (e.g., frequent travelers, reward members). Using anonymized aggregated data to inform their decision-making, marketers can deliver relevant advertising directly to these audiences, reaching them wherever

While nine out of 10 marketers believe the industry will significantly shift towards an audience-based buying approach in the next three years, only 37%, as of 2021, have made it a key part of their buying strategy.

and whenever they are watching.

In addition to providing greater precision in reaching target audiences, an audience-based approach integrates comparable metrics to plan and buy cross-platform campaigns and delivers results tied to business outcomes, rather than gross rating points.

While ABB's benefits and opportunities are abundant, in the short term some marketers are hesitant to implement this more modern, data-driven approach. While nine out of 10 marketers believe the industry will significantly shift towards an audience-based buying approach in the next three years, only 37%, as of 2021, have made it a key part of their buying strategy, according to a recent survey of marketers.

Thankfully, there are tangible steps that marketers can take to set up their TV strategies for success for the rest of this year. Below is an outline of important tips for marketers to help them overcome some of the initial obstacles they might face as they transition to and adopt an audience-first mind-set.

Redefine success. There seems to be a lack of urgency by some brand marketers in adopting a more targeted, audience-first approach, as many are satisfied with the expectations and results of their traditional demographic-based TV buys. After all, if your TV campaign is already delivering results, why change it?

Here's why: when advertisers shift to an audience-based approach – and execute smartly and strategically – campaign efficiency and effectiveness both tremendously benefit. Further, like digital campaigns, when a TV campaign is planned against specific audiences, there is the ability for further enhancements and refinement, which is key to ultimately producing greater results.

Rather than focusing on viewer count as the end game, ABB creates an audience group that will expose a marketer's brand to new customers, generating incremental reach. If you are looking to drive website visits among likely purchasers, an audience group can be crafted based on that audience's characteristics (e.g., in-market car buyers, beauty enthusiasts).

By rethinking what success looks like, your TV campaign works harder to support your marketing goals.

Tip: Start with your KPI and design your audience and strategies to best meet it.

Start slow, test and learn. Many marketers have experienced issues gaining internal and external buy-in when attempting to shift from tried-and-true legacy practices to an audience-first mind-set. Shifting the mentality from efficiency (CPM) to effectiveness (ROI and business outcomes) can be challenging without the proper support.

The most successful marketers are those who have embraced audience-based buying through a test-and-learn approach. By testing and learning, and enhancing and optimizing their campaigns, marketers have a better chance at tapping into the ROI capabilities presented by ABB.

Through test campaigns, marketers can learn what platforms, messaging and audiences produce the best results for their brand. As data-driven targeting capabilities improve and the number of video-viewing platforms consumers watch increase, it is important to understand which strategies work best.

Complementing your own learnings, real-world case studies from brands in similar categories and life stages can spark ideas and accelerate your path to optimal results.

Starting slow and providing tangible proof of your success will build confidence among internal and external stakeholders before you increase the investment, ensuring full buy-in.

Tip: Test and learn to achieve internal and external buy-in.

Break down barriers. Often, organizational silos can cause confusion around decision-making or around lack of clarity on KPIs, preventing marketers from embracing an audience-first approach.

Almost half of all marketers (47%) say that their multiscreen video campaigns are planned and bought by different teams, potentially leading to misaligned strategies, confusion regarding who ultimately controls the budget and disagreement regarding the measurement of campaign success.

Further, teams are frequently evaluated and rewarded based on different incentives. For example, buyers are often rewarded based on their ability to generate efficiency, or CPM; strategic planners are often awarded based on their effectiveness, or targeting ability; and marketers are often awarded based on specific business outcomes, e.g., sales, web traffic, etc. When adopting an audience-based approach, it's vital to rethink incentives and rewards, shifting all stakeholders to the same KPI.

By assigning clear roles and goals across teams, prioritizing integrated positions to maximize effectiveness and assigning core KPIs, marketers can ensure alignment, smoothing the process for all parties.

Tip: Streamline organizational silos, clearly define roles and incentives to ensure success.

Invest in education and training. Nearly 90% of marketers expect a "significant shift" to audience-based TV buying over the next three years, yet one-third can't accurately define what it is.

One of the key challenges with the adoption of an audience-based buying approach is a lack of education and proper training, both internally and with agency partners. Many marketers rely heavily on advertising technology for training, leading to a platform-centric view rather than holistic view of ABB.

The bottom line: Audience-based buying is a powerful and sophisticated tool that, through 2021 and beyond, will continue to transform and strengthen a marketer's ability to drive business outcomes.

To advance adoption, it's important for all stakeholders to understand how an audience-based approach provides greater precision to reach the target audience, modernizes campaign metrics and enables a buy to reach customers on any screen.

Encourage your team to broaden their own education by taking advantage of reputable industry resources, such as industry associations, research firms, vendors and more. Learning from multiple perspectives can help build a well-rounded view of the subject.

Ideally, create your own in-house training program. Craft your own syllabus by inviting a variety of industry experts to speak on the topic. Controlling the narrative and allowing your team a forum to ask brand-specific questions will make a lasting impact.

Tip: Educate stakeholders through internal and external training to maximize adoption.

Beyond traditional

By thinking beyond traditional demographics and taking advantage of the opportunities presented by audience-based buying, marketers can tap into consumers that spend nearly $4 trillion annually, or 41% of total U.S. spending, based on data from the US Bureau of Labor's 2019 Consumer Expenditure Survey.

Further, the number of available ABB platforms is steadily growing, with platforms such as NBCU's NBCUniversal One Platform and Ampersand's The AND Platform taking launch in recent years, while consortiums like Project OAR and OpenAP are collaborating with companies like AMC, FOX, ViacomCBS, Univision, FreeWheel and Vizio to help simplify and standardize the buying process.

The bottom line: Audience-based buying is a powerful and sophisticated tool that, through 2021 and beyond, will continue to transform and strengthen a marketer's ability to drive business outcomes. But its full impact can only be realized if industry professionals are armed with the proper education and training.

Additional vital steps for marketers to take include creating more awareness and familiarity with multiscreen TV platform capabilities; simplifying and streamlining terminology in presentation and pitches; reimagining infrastructure to better execute data-driven video campaigns; and engaging at reputable industry conferences and events.

Ultimately, making advancements in those areas largely comes down to implementing education and training programs that keep employees up to date on modern buying strategies. Right now, formal training in ABB is widely non-existent, and that is ultimately unhealthy for the TV ecosystem.

But I'm on a mission to change that and look forward to continuing to work with marketers and agencies to better prepare themselves for the future. While there are some hurdles for marketers and agencies to overcome in the short term, tangible solutions exist and the future is extremely bright. Today's marketers taking their first steps towards adoption will be well-equipped for success in the months and years ahead.

Danielle Delauro is executive vice president of Video Advertising Bureau.

Join MREF's Second Annual Backpack Challenge

Help us send 2,000 new backpacks full of essential school supplies to under-resourced students throughout North America.

2X MATCH

MREF has gifted $20,000 to this effort and will match every backpack purchased up to an additional $5,000!

$25 = SMILE

Your $25 gift ($30CAD) helps a student start the year with a smile. Help us reach our goal to fund and distribute 2,000 backpacks again this year.

GIVE TODAY AT MRGivesBack.org

MREF is proud to partner with Kids In Need Foundation and Kits for A Cause to fund and distribute backpacks to under-resourced students in the U.S. and Canada.

BACKPACK challenge

Did you know:

10 million American children live in poverty*

According to KINF 2020 Teacher Impact Report 90% of our teachers say at least 3/4 students:

- Arrive to class without all the requested and necessary school supplies
- Do not have adequate school supplies at home to complete school work
- Run out of supplies and their families aren't able to provide replacement supplies

OUR MISSION

To unify, inspire and activate the marketing research community to focus its collective resources to educate children and youth worldwide.

* National Center for Educational Statistics (NCES), March 2021

MREF
Marketing Research Education Foundation

Marketing Research Education Foundation (MREF)'s Race Around the World for Education is the MR Industry's Largest-Ever Fundraiser

More than 1,100 participants and 35 sponsors raised $100,000+ and logged more than 75,000 miles

Congratulations to our top finishers!

Biking:

1. Trish Seguin, The Schlesinger Group, 705 miles
2. David Breihan, PureSpectrum Team 8, 637 miles
3. Hazel Simons, InfoTools, 620 miles
4. Patricia Salamone, Gongos, 590 miles
5. Shannon Goyda, Directions/Seek, 572 miles

Running:

1. Sharyn Chen, Delvinia, 325 miles
2. Mark Parry, Zappi, 301 miles
3. Anshuman Saha, PureSpectrum Team 1, 230 miles
4. Sarah Stellick Seepaulsingh, Benenson Strategy Group, 183 miles
5. Erika Fitzgerald, Focus Forward, 181 miles

Walking:

1. Haroon Mir, Ipsos, 370 miles
2. Cheryl Halverson, Gongos, 317 miles
3. Jonathan Stewart, InfoTools, 284 miles
4. Paula Michaels, Fuel + Focus Room, 266 miles
5. Patrick Curran, Delvinia, 238 miles

Thanks to the generosity of sponsors and participants, MREF will gift $92,000 to UNICEF to support their work in education worldwide. UNICEF works in 147 countries around the world to provide learning opportunities that prepare children and adolescents with the knowledge and skills they need to thrive and believes that all children have the right to go to school and learn. On average, just one additional year of education can increase a child's earnings later in life by 10%. For that reason alone, supporting education is one of the most meaningful ways to donate to children.

Education is also instrumental to empowering girls. According to UNICEF, girls who receive an education are less likely to marry young and more likely to lead healthy, productive lives. They earn higher incomes, participate in the decisions that most affect them, and build better futures for themselves and their families. Visit www.unicefusa.org to learn more about UNICEF's lifesaving work and support children's education.

Here's what some of our sponsors had to say:

The MREF Race was a great way to bring our industry and internal teams together to support children's education around the world. FUEL + The Focus Room were honored to participate in this event as a Champion Sponsor. Kudos to #MREF for a successful event – we really enjoyed it and can't wait until next year! – Tiffany Hays, CEO, FUEL + The Focus Room

Schlesinger Group was thrilled to be a part of MREF's inaugural Race Around the World. It was amazing that so many people joined this industry initiative to help children. A big thank you to all that joined the fun. – Steve Schlesinger, CEO, Schlesinger Group

Our team loved the event! What a great motivator. Thank you so much for making this happen. Can't wait for the next one! – Kim Harrison, CEO, Focus Forward & FF Transcription

How amazing that 1000+ Ipsos Researchers walked, cycled and ran from their homes in Seoul, Geneva, Bucharest, Le Lignon, Cincinnati, Toronto for education. We look forward to 2022! – Susan Waltman, Ipsos Global President, Ipsos Foundation Advocate

It was great to see the market research community come together to get moving and help a great cause. Raising over $100,000 as a community and directing the funds to have greater impact than each company could on their own is nothing short of spectacular. Our Delvinia team really stepped up, and we were honoured to be part of a community that wants to make a difference in the world in support of MREF and UNICEF. – Adam Froman, CEO & Founder, Delvinia

We, at iResearch, believe that childhood education is the key to ending the cycle of poverty worldwide, and established the Giving for Good Foundation with a vision to bring quality education to the most underserved children in one corner of the world. Participating in MREF's virtual race has brought us a step closer to helping children across the globe exercise their right to education. This virtual event helped spread awareness among our employees who actively signed up to support UNICEF's noble cause. We're honored to be part of this grand event." – Yogesh Shah, CEO, iResearch Services and Founder of Giving for Good (GfG) Foundation

We are grateful to our generous race sponsors

VICTORS

Benenson Strategy Group · PURESPECTRUM · SCHLESINGER GROUP · marc · Ipsos · VITAL FINDINGS

CHAMPION

QUIRK'S MEDIA · SEEK Co · FocusForward · delvinia · Giving for Good · iResearch · SHAPIRO+RAJ · FUEL · FOCUS ROOM

MEDALISTS

MarketVision Research · prodege · fieldwork · Ironwood Insights Group, LLC · L&E research · PHOENIX · RESEARCH DEFENDER · gongos · fine · zappi · QualSights · VERVE · bigsofa technologies · innovateMR · recollective · InfoTools

COMPETITORS

Clear Seas Research · HOROWITZ · Rare Patient Voice

We'll be racing again in 2022! Visit MRGivesBack.org for details

••• special advertising section

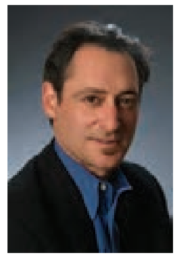
21 TOP DATA COLLECTION COMPANIES

Whether you're looking to gain a deeper understanding of your consumers or are planning to launch a product in a new market, research is critical to success – and bad data is the Achilles' heel of your research campaign. Companies that specialize in data collection have a deep understanding of the necessity of quality data and have developed tools and methodologies to ensure the collection of useful, high-quality information.

Whether your research lies with IT developers, physicians or new moms, the following companies are equipped with a range of specialties and methods to help you meet your research goals. Regardless of location or target, these companies are prepared to advance your business goals through high-quality data collection.

CatalystMR

Founded 2008
Adam Berman, President



A trusted global panel and market research services leader, CatalystMR's panels are widely recognized for our tens of millions of pre-targeted consumers as well as B2B and health care professionals across more than 50 countries. With 200+ profile targets, CatalystMR ensures balanced representative proprietary quality-controlled populations across each panel community. Global B2B targets include SBOs, ITDM, C-level, financial planners, insurance agents and trades. Health care professional targets include physician specialists, nurses and administrators. Popular consumer targets include geotargeted moms, teens, high-net-worth, Hispanics and African Americans. As a high-touch international market research services leader, CatalystMR provides full-service research and support services including survey design and analysis; a la carte online survey programming and reporting; telephone interviewing field services via a 450-station CATI call center; and custom panel builds including managing long-term private panel communities. Whether you need online panel or online panel with research services, let us earn your business!

Phone +1-800-819-3130 ext. 101
E-mail info@catalystmr.com
www.catalystmr.com

CRG Global

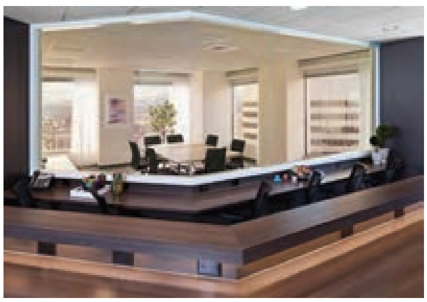
Founded 1987 | 200+ employees
Dennis Barbelet, Senior Vice President

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 with 100% onshore services: mall intercepts, pre-recruiting, attitudinal and behavior research, in-depth interviews, online research and surveys, panel development and management, and custom and multilingual 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 allows us to provide access to respondents and insights that are otherwise unreachable.

Phone +1-914-570-4021
www.dennisbarbelet@crgglobalinc.com

Fieldwork

Founded 1980 | 250+ employees
Steve Raebel, President



Fieldwork has been a qualitative research partner for over 40 years. We recruit consumer, medical, business and 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/research-venues

Global Survey

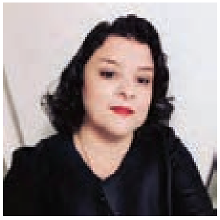
Founded 2008 | 50 employees
Mayank Bhanushali, Founder and Managing Director

Global Survey, as our name suggests, is one of the global leaders in using digital data collection to power analytics and insights. We provide data-driven decision-making for clients who listen to and interact with the world's consumers and business professionals through Global Survey online panels as well as mobile, digital and social media technologies. We apply the breadth of over 88 online consumer panels and communities across 70 countries to your market research studies. We're dedicated to continually fine-tuning our panel network to ensure quality and growth as your research needs change over time. Global Survey works with many of the world's leading market research agencies, media agencies and corporations.

Phone +91-740322-0322
www.globalsurvey.gs

Idealis Pesquisa

Founded 2008 | 20 employees
Alexander Luiz da Costa Ribeiro, Partner
Andréa Mendes, Partner



Idealis Pesquisa has developed a new service concept focused on opinion and market research to generate information to collaborate with the client's strategies, planning and actions. With analytical and creative activities, Idealis' process comprises a detailed briefing which considers client goals and evaluates the results, reading the action of each project in its market niche. Headquartered in Belo Horizonte and São Paolo, Idealis has bilingual staff to conduct projects in Brazil and other Latin American countries, for customers in sectors such as pharma and health care – from briefing, recruitment, moderating, simultaneous transmission and content analysis. Idealis serves several clients in Brazil, Europe, North America and Latin America.

Phone +55-11-3254-6317; +55-31-3495-6001
www.idealispesquisa.com.br

InnovateMR

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

Recently recognized as a top field services company in the 2021 GRIT report, InnovateMR offers experienced data collection services and consultative partnerships. InnovateMR is a fiercely independent sampling and research tech company that delivers Faster Answers™ from business and consumer audiences. 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 against all aspects of the research process including survey design, sample procurement, field management, fraud mitigation and reporting.

Phone +1-888-229-6664
www.innovatemr.com/vision-suite

Insights Opinion

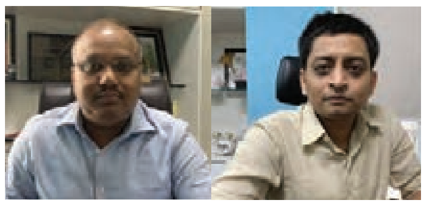
Founded 2015 | 50 employees
Sharoz Ghauri, CEO

Insights Opinion is a market research company that has provided project management and data collection services to market research firms and consultants since 2015. We at Insights Opinion stand ready to assist you in your research needs with our full slate of research capabilities and our coverage in North America, Europe, Latin America, APAC, the Middle East and the Caribbean. For many years, clients have counted on us for their consumer, B2B and health care research needs in these regions. Whether it is ongoing tracking studies or ad hoc research, we offer a variety of capabilities to handle your research needs. Additionally, we are pioneers in online and CATI sampling. We stand for high-quality data, cutting-edge panel management technology and complete data protection compliance, confirmed by our ISO 20252 and 27001 certifications. We can support all kinds of projects and have expandable reach in B2C, B2B, community-building and health care capabilities!

Phone +1-646-475-7865 (U.S.); +91-120-498-7860 (India)
www.insightsopinion.com

Internet Research Bureau

Founded 2011 | 48 employees
Shakti Kumar, CEO
Ashutosh Singh, President



Internet Research Bureau is a decade-old global survey and panel company specializing in quantitative online research and respondent engagement. Headquartered in New Delhi and with a regional HQ in the U.S. and the U.K., we have active panels in 28 countries and we serve clients worldwide. Our core services include engaging with niche consumer panels globally to gain market insights, designing, programming and conducting fast and accurate surveys. We rely only on organically acquired and smartly managed data. We firmly believe that the market research industry needs modern and better ways to conduct B2B research surveys and we are proud to take the lead in this direction.

Phone +1-310-627-2217 (U.S.); +91-114-078-9940 (India)
www.irbureau.com

Ironwood Insights Group LLC

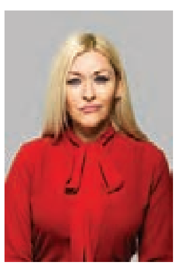
Founded 2017 | 300 employees
Brad Larson, Founder and CEO

Ironwood Insights Group leads the market research industry by offering a seamless integration of all research methodologies into one point of service. We assist corporate researchers, marketers, marketing research firms and consultants with high-quality telephone, online and multimodal data collection services. Our call centers use the latest technology with cloud-based servers and dialers for increased production, quality and security. We are HIPAA- and TCPA-compliant and maintain strict security and confidentiality controls. Our quantitative data collection services include consultation, questionnaire design, sample sourcing, survey fielding, data processing, data analysis and reporting. Our qualitative methodologies include traditional focus groups, online focus groups, online bulletin boards and in-depth interviews. We save our clients time and money by utilizing technology, automating routine processes and delivering data that answers your most important business questions. Call or e-mail today for "Insights that provide clarity and drive action."

Phone +1-602-661-0807 ext. 2110
E-mail info@ironwoodinsights.com
www.ironwoodinsights.com

Kantar, Profiles Division

Founded 1996 | 600 employees in 25 countries
Caroline Frankum, Global CEO, Kantar Profiles Division



Kantar is the world's leading evidence-based insights and consulting company. We have a complete, unique and rounded understanding of how people think, feel and act, globally and locally in over 70 markets. By combining the deep expertise of our people, our data resources and benchmarks, our innovative analytics and technology, we help our clients understand people and inspire growth. We are experts at collecting and connecting data you can trust. With our industry-leading survey design and sampling methodologies, we collect data from self-reported answers and appended profiles using the Kantar Profiles Network. Through our network and expertise in online profiles, we deliver automated access to first-party data compliantly, with speed and at scale.

hubs.ly/H0SLGCb0

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, has been known as one of the leading European data collection institutes in quantitative market research since 1986. We deliver well-executed quantitative research to meet your customer's requirement. We implement all relevant survey methods for B2C and B2B surveys with our own interviewer field for CAPI in-home, mall intercepts, PoS, mystery shopping and product tests. Thanks to our international operating phone center with 180 CATI stations for Europe and further Cido Research facilities in

Asia and Canada we cover large CATI surveys throughout the world. Krämer – the most trusted partner in MR data collection.

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

Logit Group Inc.

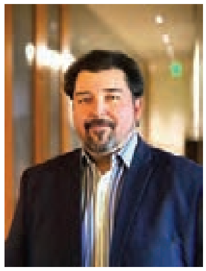
Founded 1997 | 250+ employees
Sam Pisani, Managing Partner
Anthony Molinaro, Managing Partner

The Logit Group is an innovative, technology-driven research execution company that aims to add value for our clients through expert-level insights across a wide range of methodologies. Our proprietary online platforms and call centers can handle research engagements of all sizes. With access to over 10 million consumers and B2B professionals worldwide and coverage in over 50 countries across the globe, we have the feasibility and technical expertise to take on any full-service field or sample-only study and an unrivaled in our ability to retrieve high-quality data from major and niche markets. At Logit, we have a firm conceptual grasp of what research is and where the space is headed and we always strive to get the job done right, on time and on budget. Contact us to learn more about how we can help you with your next project.

Phone +1-866-84-LOGIT
www.logitgroup.com

Mindfield Online Internet Panels

Founded 1980 | 110 employees
Gary McMillion, CEO



Still the premier online consumer proprietary panel! Powered by 40+ years of market research and data collection experience, we were a tenured and respected research company long before creating a high-quality proprietary panel using core industry principles to insure quality data (IQD) on every project. Our IQD real-time electronic countermeasures deeply line every project to eliminate quality issues as they occur and our panel is 100% Experian Data Quality-verified. Let our experienced team help you with the hard and easy projects on your board.

Phone +1-800-969-9235
MindFieldOnline.com

Momentive

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

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, **momentive.ai/insights.**

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

OMI (Online Market Intelligence)

Founded in 2007 | 100 employees
Dr. Alexander Shashkin, CEO

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

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

Quest Mindshare

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

Launched in 2003 to meet the needs of technology companies, Quest began survey operations to 45,000 persons employed in technical fields. With fast-growing panels and a focus on utilizing the greatest survey security technology, Quest Mindshare is now well-known to provide the most extensive and flexible groups of online panel assets for every B2B and consumer need. Quest's largest panels reside in North America and Europe but our project management team can superbly tackle your projects anywhere in the world. Let Quest know what your hard-to-find audience is (from ITDMs, financial DMs and web developers to moms with babies, music ratings and everything in between) and the team of market research experts and professionals will either offer support through the diverse panel assets or recommend ways to achieve your target.

Phone +1-416-860-0404
sales@questmindshare.com

Schlesinger Group

Founded 1966 | 1,200 employees
Matt Campion, CRO

Vast global panels, unparalleled sampling, recruiting and project management expertise come together for exceptional results at the speed and

quality you need for success in your qualitative and quantitative studies. Our proprietary research tech features industry-leading platforms for online discussions, focus groups, IDIs, mobile ethnography and more. Extensive panels and programmatic survey solutions give you a single point of access to global respondents. World-class insights, testing and strategy spaces are strategically located across the U.S. and Europe. We make it smarter, faster and easier to achieve meaningful audience engagement in depth and at scale to drive understanding and bolder decisions. Connect@SchlesingerGroup.com.

Phone +1-732-590-3110
SchlesingerGroup.com

Symmetric, A Decision Analyst Company

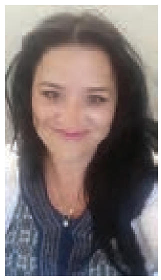
Founded 2016 | 150+ employees
Jason Thomas, President

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

Phone +1-817-649-5243
www.symmetricsampling.com/panels

Telepoll Market Research

Founded 1990 | 75 employees
Christine Schmakies, Director of Operations



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

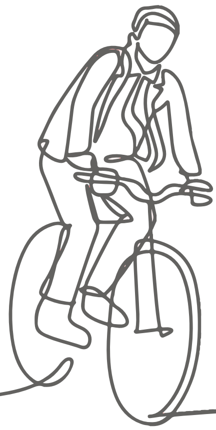
Phone +1-416-977-0608 ext. 222
www.telepoll.net

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 login 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



Deeper, more relevant insights.

Aspen Finn

strategy + insight

To know *what* people think, you must understand *how* they think. Our proven framework provides deeper, more relevant insights by embracing how people naturally relate to the world. Combining elements from cognitive psychology – perception, experience and identity – with learnings from decades of consumer conversations, we reveal authentic consumer stories to help your brand grow.

ASPENFINN.COM | HELLO@ASPENFINN.COM | +1 (888) 802-1330


TICKET PRICES START AT
$119*/£119*
Using discount code
InPerson21
*Corporate researchers only. Other packages available.
CHICAGO
SEPT. 30-OCT. 1, 2021
LONDON
OCT. 13-14, 2021
NEW YORK
NOV. 2-3, 2021

THE QUIRK'S EVENT

THANK YOU TO OUR SPONSORS

LEGACY SPONSOR

prodege

PLATINUM SPONSOR

QUEST MINDSHARE

GOLD SPONSORS

Bilendi, dynata, eye square, GutCheck, GWI., KANTAR, WebMD Medscape Market Research, VATIONMR WORLDINSIGHT, PHOENIX, STRAT7 ResearchBods, SUZY, toluna, VIRTUAL INCENTIVES

SILVER SPONSORS

BLACKHAWK NETWORK, C+R RESEARCH, quantilope, MATERIAL+, momentive, Relative INSIGHT, sightx, zappi

BRONZE SPONSORS

aytm, buzzback, CloudResearch, conjoint.ly, DATAEXPERT, delineate, Digsite, dvj insights, entropik TECH, E-Tabs Data in sight, FUELCYCLE, INSIGHT LOFT, KnowledgeHound, LUCID, methodify by delvinia, OnePulse, perksy, protobrand, QualSights, qualtrics XM, Qualzy, VERVE

OTHER SPONSORS

curion Consumer Insights. Delivered., echo Market Research, EMPOWER, fieldWORK, FUEL, FOCUS ROOM, globalsurvey, Lucy, MURRAY HILL, Olson Research Group, U&I Collaboration

Adapt Inc. The TRUTH begins with quality data, Adbloom, blueyonder Innovation in Insight, breefly, delineate, discover.ai, FocusVision, GAPFISH, HOLDEN, IMA Transforming Insight, Kadence International, KS&R, MarketCast, Marketing Systems Group, MRBA, Multilingual Connections, PRECISION RESEARCH, PREMISE, Reach3 INSIGHTS, Readex Research, sparks & honey, SCHLESINGER GROUP

TheQuirksEvent.com

TICKET PRICES START AT

$119*/£119*

Using discount code InPerson21

*Corporate researchers only. Other packages available.

EXHIBITORS

Advanced Focus · aha · The Analytics Team, Inc · AQR · ascribe · askia · Aspen Finn · AURA Inspiring Insight

Market C&C Research · CF · Cint · CORe · CRGGlobal · Curator Video Research · datadiggers · DataExpert

escalent · eyesee · flex MR · Focus Crossroads · Focus Insite · Full Circle Research Co. · Fluent Research · FocusForward

gdcc · GlobaLexicon · Global Lingo · GNN · Hark Connect · Hatchtank

innovateMR · insightsNow · Ironwood Insights Group, LLC · Integral Research · i-view London · IVP research labs · jibunu

L&E research · Liveminds · logit Research Executed · Luth research · MAi Research · Market Probe International

MarketVision Research · maru/BLUE · MedSurvey · Mindfield · mindlab · Mission Translate

Murray Hill · Numerator · the olinger group · onepoll · Op4G · Opinions · Panelbase.com

prevision research · Provalis Research · PureSpectrum · QuMind · random Dynamic Resources Ltd. · Rare Patient Voice

recollective · Research America · rosetta studio · RTi Research · Russell Research · rybbon

statista · Strategir · Tango · tobii pro · trustedtalent · Vault · Veylinx

IMMERSE YOURSELF IN NEW IDEAS AND STRATEGIES!

Mapping the ripple effects of a social movement

Active Gloucestershire

This session will discuss a new innovative methodology – ripple effects mapping – and how it visually maps the past, present and anticipated wider impacts, whilst also acting as an intervention on its own so key funders, stakeholders and the wider community are part of the evaluation.

Impact: Agile research sprints

American Family Insurance

Delivering value to your internal customer isn't as much about how much you can do, but how little. An agile mind-set and the right tool set create a value sweet spot for clarity, communication, permission and accountability.

Burt's Bees goes to China: Understanding a new market, new consumers and their needs for persona development

The Clorox Company

At Clorox there is a belief and focus on fundamental human understanding and insights. So when Burt's Bees decided to enter a new category in China, new learning was required. While the team had already begun the process of identifying unique market dynamic and building personas, there was a need to create a soul story – a deep understanding of the consumer with a focus on identifying additional learning required to truly and confidently bring the new consumer segments to life in a succinct and visual way.

How a jobs-to-be-done research approach uncovered unexpected insights
Abbott Nutrition

Mapping the ripple effects of a social movement
Active Gloucestershire

Accelerating change: How consumers adapted to virtual health during the pandemic – and what's next
Advocate Aurora Health

Breaking new ground with live and mobile video
Aha! Insights Technology Platform

Impact: Agile research sprints
American Family Insurance

Oh, this is LIT! The world's largest focus group on edibles
Aspen Finn Strategy + Insight

Harnessing augmented reality to truly innovate in pack and concept testing
AURA, Asahi, Kadence

The secret ingredient in emotional connection: How brands make people feel about themselves
Beall Research

In-the-moment research via instant messaging – A case study
Bilendi

Extreme prototyping: Driving behavioral change through innovation in FMCG
Blue Yonder

The consumer journey: A digital story
BuzzBack Market Research

Designing research for a mobile world
Buzzback Market Research

CMI-driven strategy: Intentionality in insights for a successful multicultural and diversity strategy
C+R Research Services, Inc., Whirlpool Corporation

Connecting data: Critical ingredients for success
Cint

Burt's Bees goes to China: Understanding a new market, new consumers and their needs for persona development
The Clorox Company

Achieving the winning aspiration of thought partnership

JM Smucker

Insight teams are increasingly moving from the passenger seat into the driver's seat of thought leadership. Discover a framework for organizational transformation that will help your team achieve audacious business goals.

Trust me, I'm a futurist – How I harnessed curiosity to imagine a post-pandemic future

Mars Wrigley

In 2020 amidst well-known pandemic challenges, I joined a group of curious thinkers to transform how Mars turned foresight into action. While the pandemic may be a great example of how challenging it is to foresee the future, in truth the world is constantly changing, and a guide to navigate through uncertainty does exist. In fact, strategic foresight is a formal practice and (if we're honest) sounds like a made-up job. So to help our business see beyond 2020, we made it less academic and less complicated. Put simply, we defined it as: 1) looking at the crossroads of history x (ever-constant) human motivations x signals of change, and 2) harnessing curiosity. We drove business action and, most importantly, reinstated the potential power of foresight.

Turning it up to 11: How we're bringing together the richness of Microsoft's market research to guide the launch of Windows 11

Microsoft

How does Microsoft track the launch of a product that will impact so many aspects of its business? Using the full range of its market research tools to track and diagnose how Windows 11 is landing in-market – from announce moment to the user experience – and then integrating those insights into a unified story that will go out to all our stakeholders so everyone is on the same page.

Concrete eaters, bleach drinkers and flat earthers: How to defend online research from bogus respondents

CloudResearch

Who really needs a CX culture? – Curated by MSPA

MSPA, Delaware North

How Hormel Foods successfully applies jobs-to-be-done to innovation

Digsite, Hormel

Brand growth: What do 'winning' brands do differently?

DVJ Insights

Exciting innovations in automated charting and reporting

E-Tabs

Doing more with less: The ESOMAR Global Survey of Buyers of Insights

ESOMAR

Improving efficiency, reach and influence: Three practical ways to empower insights for better business decisions

FlexMR

Customer segmentation: Lessons learned to maximize impact

Healthline

Does focusing on your customer make you consumer-centric?

Hi-Cone

Ethnographic research in the age of COVID

Horowitz Research, pladis

The infinite loop of digital transformation: Using insights to power the customer experience

Icreon

The woke consumer: Evaluating buying trends in BIPOC communities amid COVD-19 and the social uprisings of 2020

Inclusive Market Research Group

The newness effect: Connecting the dots between implicit emotional impact and behavioral disruption

InsightsNow

Healthy transformations: How consumer insights are driving the Institute for Integrative Nutrition's health coach training program

Institute of Integrative Nutrition

Standing out in the streaming services space: Understanding drivers of behavior in the streaming services landscape
MAi Research

Trust me, I'm a futurist – How I harnessed curiosity to imagine a post-pandemic future
Mars Wrigley

Transforming a subpar tracking study into a world-class brand insights program
Material

The beauty of insights: Leveraging habit formation research to fuel business impact
Material, Ulta

Turning it up to 11: How we're bringing together the richness of Microsoft's market research to guide the launch of Windows 11
Microsoft

From nudge to budge: Measuring the effectiveness of behavior change campaigns
Mindlab International Ltd.

"Which box am I?"
Monster Wordlwide

Agile and iterative: Using real-time data to drive virtual visits
Ochsner Health

How The Evening Standard introduced agile research to inform strategy and add value for commercial partners
OnePulse, The Evening Standard

Achieving the winning aspiration of thought partnership
JM Smucker

Linking together the full-circle consumer journey... A sausage odyssey
Johnsonville

The pandemic's impact on B2B research: An opportunity for transformation
JP Morgan Chase

How to drive sales impact with shopper insights
Kellogg's

Inside and out: Driving inclusion in the industry
Kijiji

What's love got to do with it? Measuring emotion with a System 1 vs. System 2 lens
KS&R Inc.

Insight alchemy: A curious compendium of golden alchemical elements of insight discovery and craftsmanship
L'Oréal

The pandemic's impact on B2B research: An opportunity for transformation

JP Morgan Chase

The global pandemic drove a seismic shift in the way companies do business and the way we lived our lives. The "imperative" to transform the way qualitative research was conducted accelerated a number of nascent trends and created new opportunities to better leverage technology. This session will focus on lessons learned from the crisis and how one client-side organization adapted to the challenges presented by the pandemic.

How to drive sales impact with shopper insights

Kellogg's

Do you want to know how to turn shopper insights into action for the retailer? Then you will enjoy this session! It provides helpful strategies to better serve retailers and ultimately drive sales for them and your company.

Insight alchemy: A curious compendium of golden alchemical elements of insight discovery and craftsmanship

L'Oréal

The chief insights person to the South African gold industry post-apartheid and L'Oreal Groupe's current head of insight and foresight shares tips, tricks, tools and techniques for insight mining, refining and smithing – derived from gold alchemy. The secrets of gold alchemy are the perfect metaphor for insights best practices. Featuring "The Future of Insight" from the world's 25 futurists. Plus, a bonus "Elements of Insight Discovery" (periodic table crib sheet).

What to do when strategic projects go sideways: A playbook for your next challenging project

Tyson

What do you do when you're in the midst of your biggest strategic deliverable for the year and disaster strikes? Although COVID was hopefully a once-in-a-lifetime event, markets change, small disasters happen and the uncontrollable makes insights roles challenging.

Use of futures and trends to inform strategy

UCB Celltech

A look at how strategic competitive intelligence utilizes and combines with foresight/futures and trends to understand competitor strategy and influence the development of company strategy

How to use data to elevate diversity, equity and inclusion within your workplace
OnePulse, Rapp Worldwide

Real-world B2B segmentation
OutSystems

The (more than) ready-to-go workforce
OvationMR

Tell me what you want, what you really, really want
Peapod Digital Labs

Creating and measuring impactful communications in a post-pandemic world
Phoenix Marketing Intl

Accelerate brand growth with behavioral science
Protobrand

The pluses of post-pandemic qual
QRCA-Sponsored Session

The hidden power of the pinky swear – Why marketers and qualitative researchers must pay attention to rituals
QRCA-Sponsored Session

Context and confidence: Erasing the line between qual and quant
QualSights

Delivering superiority digitally: Partnership between the best of tech and the best of brains
Qualzy, Blue Yonder Research

Transformational change: From traditional market research to an efficient AI-powered insights automation system
quantilope GmbH

Keep your COVID customers: How Brunswick is leveraging mobile messaging-based conversational insights to nurture the next wave of brand advocates
Reach3 Insights, Brunswick Corporation

What consumer insights can learn from the new age of journalism
RealityCheck Market Research

Analyzing open-ends to help pass the vibe check
Relative Insight

Using analytical planning to drive organizational action
Rockwell Automation

Voice of the customer insights: Accelerating innovation under pressure
SAP

Money can make or break you: How to determine the optimal pricing research methodology for your offering
SightX

Using creative research methodologies to design valued ecosystem experiences
Smart Design

Burnout – the dirty secret of the research world?
Stephanie Rowley Coaching

Do consumers really want sustainability?
Strategir

Contextual reframing: Why you need to rethink your research assumptions
FaderFocus

What to do when strategic projects go sideways: A playbook for your next challenging project
Tyson

Use of futures and trends to inform strategy
UCB Celltech


THE QUIRK'S EVENT

THE Q REPORT

CORPORATE **RESEARCHER** REPORT 2021

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

QUIRK'S MEDIA

WELCOME TO THE EIGHTH ANNUAL QUIRK'S Q REPORT!

As was the case in 2020, our 2021 Q Report again focuses on the impact of the pandemic on marketing researchers and their jobs. But while COVID-19 is clearly not going away any time soon, for this iteration we chose to also look forward, asking our researcher respondents for their take on the future of their profession.

We also asked about their likelihood to hire research staff in the next 12 months; their level of satisfaction with their current job; the new skills they feel could most benefit their career; how valued their feel research is internally and in business overall; and the importance of corporate diversity, flexibility and support for their professional development.

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

The 2021 Q Report work life and salary and compensation study of end-client/corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research subscribers of Quirk's. The survey was fielded from June 10 to July 16, 2021. In total we received 1,951 usable qualified responses of which 816 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.16 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

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

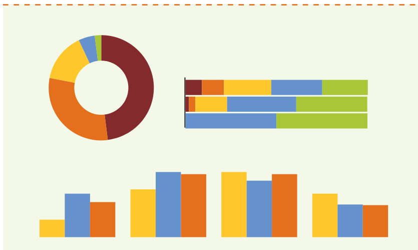
We also want to thank our content partners for sharing their industry insights. Toluna outlines the ways automation can deliver insights with speed and agility. InnovateMR charts the new age of customer validation. DISQO shows how behavioral data can bridge the say-do gap. Bellomy makes a case for text analytics. Gocious offers tips on aligning research and innovation. SightX explores the implications of brands' responses to the pandemic. InsightsNow gives a crash course in implicit testing. Forsta argues for the value of visual storytelling. Momentive illustrates the merits of new technology for adapting to the pandemic. And Quirk's Talent looks at how researchers can explore a gig work approach.

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

Sincerely,

Joseph Rydholm
Editor
joe@quirks.com

CONTENTS



INDUSTRY INSIGHTS

QUIRK'S MEDIA

Quirk's Marketing Research Media
4662 Slater Road | Eagan, MN 55122
651-379-6200 | www.quirks.com

Publisher • Steve Quirk
steve@quirks.com | x202

Editor • Joseph Rydholm
joe@quirks.com | x204

Digital Content Editor • Emily C. Koenig
emilyk@quirks.com | x210

Download the Quirk's magazine app to view this report.

An interactive downloadable PDF copy of this report is available at www.quirks.com

Follow us on Twitter @QuirksMR.

ON THE RISE

Corporate insights teams beating back threats, reestablishing relevance

By Joseph Rydholm >> Quirk's Media

Late last July, when we began fielding the survey for the 2020 Q Report, we were all in the thick of the pandemic. Almost a year later, launching the survey for this year's Q Report, there are tantalizing signs that we are coming out of it – along with the delta variant's daily reminders that COVID-19 is not going away quietly. While in 2020 we asked researchers many questions to get at how they were adapting to the pandemic's many impacts, this year we pivoted to a more forward-looking approach.

In other words, how do we feel about where we are and where we might be going?

The Q Report work life and salary and compensation study of end-client/corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research subscribers of Quirk's. The survey was fielded from June 10 to July 16, 2021. In total we received 1,951 usable qualified responses of which 816 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.16 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

Along with a host of questions about department staff levels, years on the job, skill sets and job satisfaction (see the accompanying content for a deeper dive on those findings), we asked open-ends about: the biggest research-related changes their organization planned for the coming year; how valued they feel marketing research is internally and in the business world as a whole; and how they feel about the future of insights as a profession.

Hopeful and optimistic

No major themes emerged from the question about the MR-related changes planned for the coming year and the tone was largely hopeful and optimistic despite the current societal backdrop. Lots of talk of automation (of reporting, analysis, etc.), of centralizing (from small tasks like getting a handle on processes such as documentation and global standards to reorganizing the insights function) and of coming to grips with the impact of company-wide overhauls.

> *Internalizing market research activities (survey programming, fieldwork and data processing) in order to become more agile and deliver market research results and insights much more rapidly. Providing a 360-degree view on market knowledge and insights: becoming data source- and survey methodology-agnostic!*

> *Continuing to reinforce the goal of establishing the team as a center of excellence that the entire organization should rely on. The practice has*

previously been that some teams went off on their own to launch market research projects with external vendors, which in some cases led to redundant work. The centralized approach will streamline market research projects that could be utilized across the organization, while ensuring that internal-trained market research professionals manage the process from start to finish.

Rather than being focused on market research, our team is growing into a strategist role. It's likely more of our research will be outsourced and our team will be more focused on the 'story of the data' and how it impacts our clients' strategy and business.

For every mention of reducing headcount there seemed to be one or two indications of adding workers (along with some bemoaning of the difficulty in doing so) and the general impression is that the new team members were part of staff expansions rather than refilling vacancies from COVID-19-related furloughs or layoffs.

After investing year after year in digital analytics, our new CMO has made an investment in an additional analyst on the market research side. We look forward to hiring this new person in the next year. This person will focus on our audience of the future (younger and more racially and ethnically diverse).

Researchers offered many expressions of intent to continue providing insights not just data, as a way to deliver more value for internal clients while also demonstrating the limits of relying on gathering data without having staff and processes on hand to make sense of it.

I don't anticipate any structural changes (hiring, budget adjustments, etc.) but as I get better at demonstrating the value of data and making good use of the tools we have, I think the adoption, acceptance and appetite for data will all increase. I hope that data and my role will have more of a strategic seat at the table early in project planning processes.

There were also multiple comments around organizations becoming more customer-centric, often due to new leadership calling for the change. (You'd like to think focusing on the customer is a given but as we all know, edicts from above are often more powerful drivers than common sense!)

> *More research is being demanded as internal clients get the message that the new CEO wants VOC justifications for product design/development, etc.*

Though sometimes too much C-level involvement/interest is a bad thing.

> *We have multiple layers of new leadership (from CEO down). Once again insights has a SVP leading the team with a direct line to the overall head of marketing. That alone will get us a 'seat at the table.' Unfortunately reorgs will happen. And we are somewhat struggling trying to satisfy these new leaders, some of whom are from different industries. They are demanding changes to tracking studies without understanding all the impacts, only considering their demands. This will make it very tough for some time.*

Within many companies and organizations, one welcome (if you can use that term for anything connected to COVID-19) impact of the

POSITIVES

- Pandemic bump for value of insights
- More data = more need for MR
- Qual coming back
- Customer centricity on the rise
- Proven ability to adapt/evolve

NEGATIVES

- Falling response rates
- Panel data quality
- DIY not going away
- Automation/AI
- UX encroaching on MR's turf

pandemic was the elevation of the insights function's internal status as a beacon in the dark, as everyone from the CEO to the regional sales manager suddenly felt tempest-tossed by the economic and societal shifts and changes.

How valued?

While not pegging it to anything related to COVID-19, we asked respondents twin questions on how valued they felt the insights function was at their organizations and in the general business world (using a 0-10 scale from not valued at all to extremely valued).

At the organizational level, a combined 64% rated the value between 7 and 9 and the comments reflected that generally positive assessment.

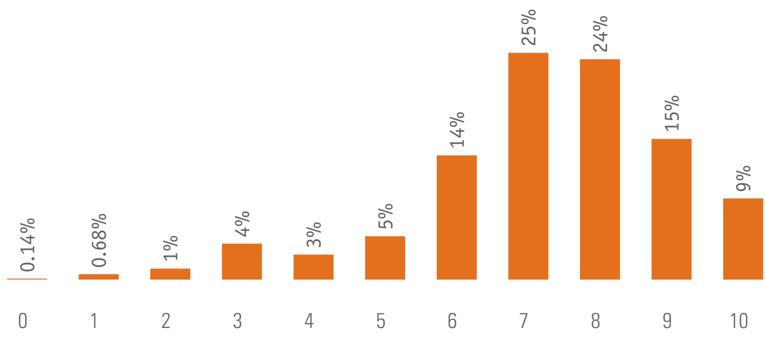
> *We have worked hard for a seat at the table and it's paying off. Market research is a valued business partner.*
>
> *There is so much demand for insights, we can't keep up!*
>
> *The pandemic has changed it for the better.*

But alas, the picture is not all rosy in other organizations:

> *Research is so expensive to execute. There is little knowledge on balancing the practical with the theoretical. It is seductive to half-ass things to keep costs low. This is compounded by the widespread lack of understanding in executing research by our peers. Our internal partners reflect on past experiences where they worked with insights folks who delivered what they needed. What they don't know is that what they were served was poorly designed garbage a slight step above a gut check.*

How valued do you think the marketing research and insight function is at your organization?

(Using a 0-10 scale of "Not valued at all" to "Extremely valued")



HOW MR CAN BOOST ITS INTERNAL STANDING

Get out there and spread the word:

> *I routinely share and present my research findings and insights to our CEO, senior leadership teams, on down to individual contributors. I see firsthand how my insights and recommendations are implemented across the organization, used to uncover other opportunities and are part of action plans.*

Deliver quality results – quickly:

> *While they come to us often, we have the reputation of being 'slow,' which brings our value down.*

Let them know not just anybody can do research (and keep DIY at bay!):

> *We are constantly educating people on what it is that we do. Once they understand, they see the value.*

Keep growing professionally:

> *We need to evolve and be multi-skills people: data scientists and analysts, marketing specialists, web researchers, sociologists, behavioral scientists, qual researchers, excellent communicators, cross-functional managers.*

INNOVATEMR'S VISION SUITE: THE FUTURE IS VALIDATION

By Molly Strawn
Senior Marketing Strategist,
InnovateMR

"Ma'am, can I have a moment of your time to ask if you have any food allergies and how often you eat out at restaurants?"

That was me, adorned in my signature clipboard and DIY polo at the Thousand Oaks mall, getting ignored by the fifteenth person in a row. I was attempting to gather customer validation for my newest corporate venture: Simple Lyfe. But as it turned out, a company working to certify restaurants in allergy-safe food services was not drumming up the hoopla I had anticipated.

No matter our passion, drive or gift for strategic planning, we simply cannot sell a product or service that no one wants. As I discovered with Simple Lyfe, target customers "in the wild" may not share that same deep passion previously seen in research and development forecasts, marketing decks or enthusiastic sales huddles. Of course, I would not have learned this if I had not stepped outside the business (literally) and just got to work in a bubble. Without gathering sentiment about your passionate dream from the outside world, wasted time and missed revenue is inevitable.

Collecting key insights from target audiences – market sentiment, concept validation or purchase habits – is the most crucial step in the entrepreneurial journey but remains the hardest to achieve. Solopreneurs have limited access to the actionable insights they need and even less access to a large-scale research project. Unless teams prioritize research spend and efforts upfront to answer these questions (typically, with a generous investor to foot the bill), they may go for months, if not years, with their blind spots unchecked.

But there is a foundational shift occurring. You no longer need to be fluent in research jargon (adopting phrases like "survey link appends," "redirects," "LOI," "EPC," etc.) to find the answers to important questions. The future of research will be built on agile, adaptive technology – solutions that give everyone, professional researcher or not, access to the insights they need to help push their businesses forward.

We are feeling this shift in the market research industry but it is not an isolated incident; large corporations, as well as entrepreneurs, do not have the time or resources to devote to manage multi-step studies. However, the need for insights has only grown stronger. Today, attention spans are dwindling, customers demand a corporate conscience behind their favorite brands and one disparaging review can rip through social media like wildfire. New entrepreneurs need to find new ways to prepare. They are smart, sophisticated and hungry for intuitive solutions presented with simplicity to help them prepare for business longevity.

InnovateMR has created the technology these decision makers need: the Vision Suite™. I have created many surveys on various platforms in my startup journey but never one that streamlines the entire research process into one easy-to-use workflow. It goes beyond intuitive survey creation to tie in profiling/targeting to ask the right person the right thing, instantly. Quick-pulse insights like this could be the difference in what product gets developed and which blueprints are not worth the investment.

But just as the data needs to be fast, it also needs to be right. Participant answers cannot inform actionable insights unless they are reliable. InnovateMR is continually on the forefront of market research data quality with customizable and adaptive quality tools. A part of the Vision Suite™, Text Analyzer™ is a revolutionary new way to verify open-end text responses at scale using AI technology, wading through hundreds or even thousands of replies to extract meaningful and genuine feedback automatically. It will flag gibberish, profanity, copy/paste action, bot scripting, spelling errors, type timing, duplication and identifiable information. It will even look for contextual answers to ensure the text is directly addressing the question.

When every unique voice has access to tools that comprehend, contextualize and anticipate the future of business, it will pad our economy with solutions custom-fitted to the direct needs of the world. My days at the mall with a clipboard may be over but the new age of customer validation is just getting started.

innovateMR

www.innovatemr.com

And others expressed variations of "it depends," citing factors such a lack of organization-wide belief in insights and a disconnect between management's words and its actions (sound familiar?) for their middling assessment:

> *I say 6 because I think our organization is generally pretty interested in research but how much they apply it varies by the individual.*
>
> *We say we are consumer-driven and consumer insights is our top priority but the company often doesn't act like that's true.*
>
> *Highly valued by the marketing team, not always as valued by our partners across the organization.*

As to the reasons why it's not always valued:

> *(C)ustomer insights activity is seen as requiring basic skills, a lot of people are teaching you how to do your job, some even try to do it 'because it's rather obvious,' thus insights people are positioned at low levels in the hierarchy.*
>
> *Too many people just want to go with their gut – that has not worked out well in many cases – but we are a male-dominated organization and have a lot of egos that need to be heard.*
>
> *Our CX/MR function is very new and we are still trying to demonstrate value.*
>
> *I was hired six months ago to revamp the MR function at my company. There is great enthusiasm for more and better research yet also a fair amount of reluctance to let go of the way things have been done for decades (without consistent professional leadership in the MR function). I'm content and pleased with the level of enthusiasm for better research,*

though there are still challenges ahead.

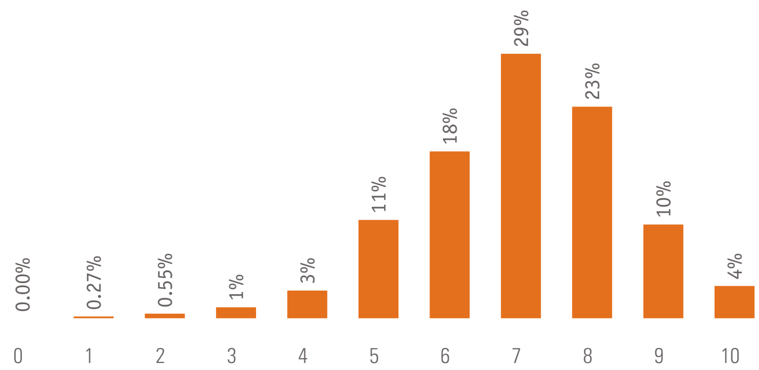
Very valued, but not in the right way. Too much emphasis on scorekeeping, satisfaction research, not enough on insights and supporting strategy. (Stakeholders already think they know what the market wants.)

Similar problems

Respondents seem to feel that research is a bit more valued in the general business world, assigning slightly higher external valuation levels than internal while also citing similar problems.

How valued do you think the marketing research and insight function is as a profession in the general business world?

(Using a 0-10 scale of "Not valued at all" to "Extremely valued")



INDUSTRY INSIGHTS

ing of the "why." However, bringing survey recall and passively collected behavioral data together from a single source is what truly closes the gap because different things can actually happen than what people originally intended or wanted.

In market research, understanding the say-do gap becomes critical to the success of corporate initiatives in several ways:

Brand equity tracking: Among the myriad benefits that brand tracking provides, adding behavioral data can catch early signals of change and create better predictions of sales performance than survey data alone.

Marketing strategy: Leveraging behavioral data in tandem with survey data uncovers a complete, holistic view of the customer journey. Connecting people's opinions to their actual behaviors is key in understanding how to effectively market to consumers at every touchpoint.

Advertising effectiveness: Not all media can be easily measured through survey tags. By adding behavioral panel views of actual ad exposure, such as on social media sites, a completely distinct and neutral analysis of advertising performance can be executed for media optimization, including the impact on sales behaviors.

Product development and innovation: Rich consumer insights are vital at every product stage from ideation and testing to commercialization and beyond. Identifying and closing the say-do gap drives new product innovation and ensures product success.

Customer experience: People at the extremes of experience are the most likely to respond to CX feedback mechanisms. Analyze actual experience for the general population instead of only hearing from the most vocal customers by combining survey feedback with passive behavioral data to achieve a true understanding of the drivers of experience.

As the need for accurate insights continues to grow, researchers must determine when to apply a standalone survey-driven methodology, when to leverage observed behavioral data or when a combination of the two would be best. Have you checked your insights for the say-do gap?

www.disqo.com

Research is tricky. When it says what people want to hear they love it. When it gives a different answer they question and challenge the results.

Everyone talks about understanding customer needs. I am not saying MR is the only way to uncover such needs, nor I am saying research does this perfectly, yet research is less valued compared to the value it delivers.

Oversurveying, DIY tools and the widespread availability of data from a host of non-research sources were cited as factors diminishing the impact of insights-gathering.

Marketing research is still undervalued in many companies. A recent focus on data science (a.k.a. data warehouses) is clouding the waters for us before executives. It is a fight to stay relevant and visible.

The democratization of data collection through SaaS tools and the demands for agile research means that a lot of the standards and skills associated with high-quality research are thrown out the window. Also, now it seems everyone is researching the customer. Not unlike the 'tragedy of the commons' when we phoned the public, now it is done through many channels. I suspect customers will eventually get tired of being constantly asked for their opinion after every transaction they have with a company.

Everyone thinks they're a market researcher. The DIY tools place the research capability in untrained hands or in the hands of those interested in lead gen, etc., and it hurts bona fide research efforts.

People are being inundated with feedback requests, forms and surveys. There is starting to be a lot of garbage input.

Look ahead

After assessing the present, we wrapped up the survey by asking them to look ahead and give us their views of the future of the insights profession. Again, optimism generally reigned, with respondents seeing opportunities for personal and professional growth, thanks to research's pivotal (and long-acknowledged) role as the conduit through which companies hear the voice of the customer.

> *I think it'll always be necessary, even if it will constantly be changing and evolving. Our group always says that market research is just one data point alongside many. I don't believe that will change, even as new types of data points and ways of gathering information come into the picture.*

NOTABLE AND QUOTABLE

> *The availability of DIY tools means some think they can do market research and are an expert. Just because I can go to Home Depot and buy all the things necessary to build a house does not make me a homebuilder. I realize my inexperience and limitations. I wish others would do the same when it comes to market research.*

> *They may get rid of [the marketing research function] entirely as they feel they can automate all our survey findings into self-serve portals for all business partners. So they will pull data they don't understand nor know how to apply. Good times.*

I feel very enthusiastic and optimistic. We're clearly in a transformation era that is placing shoppers, consumers and people at the heart of business and brand strategies. Data and technology are bigger and bigger enablers but there will still be a crucial need of human intelligence to connect the dots and identify growth opportunities.

The business intelligence movement is highlighting the importance of data insights so research is once again coming to the forefront as important to business decision-making, respondents said.

I'm semi-bullish. If we get stuck thinking about insights as primarily a survey-based profession, we will slowly be replaced. But I'm optimistic that the insights profession will be able to stay current and adapt to a [combination of] more captive data analytics + traditional insights methods.

I feel very positive about the future. The amount of data is exploding every day and the industry needs people to analyze and make sense of it.

If we get the message across that you need dedicated insights people with skills in data and storytelling then the future is good.

The outlook is positive, I think marketing research will be increasingly valued especially for those that can triangulate insights with other non-research data sources (e.g., operational product metrics, financials) to align findings across the business.

Data-quality issues seemed to top the list worries, in the form of fretting over falling response rates and fears about fraudulent panel respondents.

I'd feel better about [the future] if panel sample wasn't such a problem.

SPONSORED CONTENT

STREAMLINE INSIGHTS COMMUNICATION TO ALIGN RESEARCH AND INNOVATION

By Adam Schalke
Director of Business Development, Gocious

Your company wants to grow. Your boss asks you to validate a new product strategy for the path they're considering; your job is to help balance opportunity against risk.

Your risk vs. success assessment can include areas such as:

- market evaluation
- competitive analysis
- brand-new, disruptive product ideas
- incremental product ideas
- build vs. buy analysis
- pricing strategy

You deploy proven research methods and use your favorite tools to come up with comprehensive data sets and important insights. You present them to the team in a combination of typical tools, such as PowerPoint decks, Excel spreadsheets, Word docs and e-mail. The team is excited by the data and seems to "get it" as you're presenting it.

However, once the research is completed and you're on to other projects, how do you know if the product team was really able to put your work to use? And further, what was the impact made on the end project, whether it's the go/no-go decision or actual implementation? And without this knowledge, how do you ensure that you're growing and improving your output so that your team is on the right track and can put your insights to practical use?

Clearly, there's often a disconnect between research and innovation teams. The issues are multifold – from poor communication to habitual use of "flat" non-dynamic tools (read: PowerPoint, Excel, etc.) – making collaboration challenging. With the lack of a single tool that multiple business units can access and work in as a "single source of truth," even the most brilliant insights can be easily forgotten and dismissed as too much effort to decide for and use.

With busy teams, the results are often lack of follow-through, *Despite practically all industries increasingly relying on data analysis for decision making, I am becoming skeptical of the quality of insight you are able to obtain via survey research. Too many panels seem to have professional survey takers/task rabbits taking surveys and I think people have become increasingly able to goose quality-detection mechanisms.*

Research vendors take note: Despite the impressive progress made in offering alternatives to pages and pages of radio buttons, client-side researchers still hunger for survey tools and approaches that offer respondents a fun, potentially entertaining (or at least not stultifying) experience.

I think response rates will decline. There's opportunity in survey research to innovate ways of gathering data that are less time consuming/difficult for respondents.

It will continue to be important but will have to find creative ways to get feedback instead of using long questionnaires.

[S]urveys aren't short enough, gamified enough to continue to engage humans.

Though, that said, for all of the decades of talk of the need to shorten surveys, questionnaires remain stubbornly lengthy and no matter how engaging a survey platform is, a long survey is still a long survey. Further, researchers are the ones writing (or approving) the questionnaires so if they really want to stop burdening respondents, it's all within their power to do so.

UX encroaching

A popular topic at industry conferences in recent years has been the intersection of UX and marketing research and the tone has always been very collegial, with the two disciplines sharing many commonalities, but interestingly in this edition of the Q Report survey there were many slightly wary-sounding mentions of UX encroaching on MR's turf, with the biggest worries seeming to be internal confusion over what each one does and an eventual subsumption of research.

> *The increase in UX research teams in many companies also seems to be impacting the perception around market research teams, as many companies don't understand the difference between the two functions.*
>
> *I think it is heading in a particular direction – UX research and big data. I see a need for my area of expertise waning.*
>
> *[Research] needs to continue evolving as the boundaries with the other types of insight professions are getting more and more blurred.*

Respondents made many mentions of artificial intelligence (AI) and automation and the threats they embody to the marketing researcher's traditional strong suits of data gathering and data analysis. But commenters also see the rise of dumb data as an opportunity for researchers to step in and give shape and voice to its meaning.

> *I was worried a few years ago when the rhetoric was that AI and automation would take over our industry. I think two positive things have happened: 1) AI and automation are now focused on enhancing our jobs; and 2) people have realized that a shift to AI and automation left everyone asking 'why' consumers or clients do what they do and thus there has been a shift back to qualitative research being critical again.*
>
> *With actual data available more and more every day, it will be less important to get stated intent data. It is critical that insights and analytics are combined.*
>
> *We're moving into much more of a digital space – a lot of the data we used to rely on quantitative surveys for, we can easily get in other ways. I think market research will remain important but will evolve into something much different. That said, there will always be a need for qualitative research.*

Along with fears of too much DIY research among internal groups, while there were plenty of expressions of worry over tech-based tools usurping research's role, whether born of experience using some of those tools (and finding out they're not going to instantly make research obsolete) or just a general societal trend of being more comfortable with (i.e., less afraid of) technology, many respondents sounded notes of optimism around being able to harness tech for their advantage.

> *I think the tech bubble of shiny and new will burst once we realize that it isn't the replacement for traditional research that we all expected. Nothing replaces human interaction when it comes to getting information from humans.*
>
> *I think a recalibration has been happening – in recent past, there had been a large pendulum swing to big data and analytics away from primary research. I think that things are rebalancing as companies realize that big data can't solve all ills and yield all insights, and that integrating the two is the best path forward.*

NOTABLE AND QUOTABLE

> *Not terribly optimistic [about the profession]. My son expressed interest and I suggested he look at other alternatives.*
>
> *Very positive. Seems like more and more companies are recognizing the value of our work and changing their mind-set about the customer from "I already know them" to "I need to truly know them."*

And this tech vs. human angle may also extend to the people who work with the data, in the eyes of some respondents, who cited the benefits to marketing researchers of having a long of history of surveying and interviewing people, unlike the (big) data analysts who are more versed in working with data.

> *Much of the functional work to conduct marketing research is being automated so the day-to-day tasks of designing surveys, collecting data, tabulating and analyzing data are being greatly reduced. We need to replace those functional tasks with higher-value strategic functions that can't be replicated with technology. We need to evolve and add more skills to our toolkit than traditional marketing research. Additional skills/experience such as moderator training, data science, organizational psychology, workshop facilitation and others are needed to broaden the value of our function in business and elevate it to a more strategic place inside organizations.*

Sounds simple enough!

CONSUMERS REMEMBER WHAT YOU DID LAST SUMMER

By Naira Musallam, Ph.D.
Co-founder, SightX

In 2020, our collective circumstances changed drastically, transforming life as we knew it into one of the most memorable experiences of our lifetime.

As is often the case in life-altering events, change begets change. And as we took a step back from our hectic lives, many of us found ourselves reevaluating our priorities and values, both on an individual and societal scale. During these times, many emphasized time with their families and others experienced the pain of being away from loved ones. Some experienced growth and others went into survival mode. It was a year where many spoke out against long-standing racial inequalities.

Ultimately, these changes worked their way into our consumption habits, where they are likely to stay. Through research with our partners at Vox Media, we found that brands who can acknowledge this moment, delicately navigate the changes and deliver on their promises will be the most successful in building trust as we move forward. We would like to share three key takeaways relevant to the insights community.

The power of empathy

In the last 15 months, 75% of people reported experiencing some form of loss. Often, these losses occurred in multiple areas of their lives, impacting everything from careers to mental health. Even those lucky enough to count themselves within the 25% still faced a slew of changes that suspended life as they knew it.

All of the losses we faced, large and small, will continue to shape our thoughts, actions and behaviors for the foreseeable future. While moving forward may feel like a daunting task for some, empathy will be key in easing the transition.

... being able to genuinely speak to the changes people have endured will be invaluable.

For brands, this will mean finding a way to authentically acknowledge the pain, hope, fear and uncertainty many are feeling. Leading with empathy may feel a bit strange, especially for companies that dominate their marketing with sales-focused language. But being able to genuinely speak to the changes people have endured will be invaluable.

Navigating change

As we make moves toward normalcy, 84% of people expect brands to take a more active role in navigating the transition. Many (51%) think brands should encourage us to put COVID-19 behind us as soon as possible. Some (37%) want to see brand messaging that can help us adjust to all of the changes we have experienced. Others (20%) are looking for brands to focus primarily on safety. And a small but not ignorable percentage (12%) want brands to come up with campaigns to reenergize us.

No matter the exact message, it's clear that most of us would prefer brands to be connected to significant events taking place in our lives. And while leading with empathy is the first step, brands will have to find ways to more deeply understand the feelings and motivations of their audience(s) to know how to empathize effectively.

Delivering on promises

In 2020, we saw many brands jump headfirst into conversations surrounding topics like the pandemic, social justice or equality. However, as time has passed, many brands have toned down their stance or gone silent entirely and people are taking note.

Nearly a quarter of people expect brands to continue supporting underserved communities, even after we put the pandemic behind us. However, it is important to note that support shouldn't only be vocal. Many people have become especially sensitive to performative empathy and allyship. Brands that can live up to their messaging and tangibly support the causes that matter to them and their customers will succeed.

As we chart a path forward, the brands that build trust will be those that focus on understanding the changes their customers have undergone in the last year.

sightx

www.sightx.io

INSTRUMENTS FOR INSIGHTS

What skills do researchers need to navigate the future of research?

By Emily C. Koenig >> Quirk's Media

In the 2020 Q Report, researchers around the world made it clear they were up for the challenge of redefining insights and identifying the skills necessary to survive the unknown. This year, as the marketing research and insight industry works to manage a changing economy – including shifts in individual markets, consumer behaviors and research trends – we thought it appropriate to see what new skills and/or expertise researchers think would be most beneficial to their careers.

While some respondents reported the need for more tools rather than expertise/skills ("I just need tools better than Excel."), most responses focused on a combination of industry-specific hard skills, general soft skills and the importance of continued education.

Focus on tech

Researchers made it clear they are committed to upping their digital game, though the focuses were quite varied. Respondents shared the desire to improve skills around a variety of programs and software, ranging from Zoom, PowerPoint and Photoshop to Tableau and SAS. One respondent simply wrote, "Anything that has to do with online/technology."

Big data – a leading buzzword from years past – was only mentioned by name a handful of times. But there were multiple mentions of AI, data science, conjoint analysis, technical coding, programming and data analytics.

Many made it obvious that the need for specific new skills stems from companies bringing more tasks in-house.

SPONSORED CONTENT

WHAT'S THE 'SO WHAT' ABOUT IMPLICIT TESTING?

By Dave Lundahl
CEO, InsightsNow

In this time of change, companies have had to become more agile in how their business decisions are made. The consumer today is different than before the pandemic. Health and wellness concerns are heightened and new concerns have emerged regarding sustainability and diversity. More shoppers are using online tools to inform their purchase decisions – or to avoid retail altogether through online purchases.

As a result, we find ourselves in a time of incredible innovation as companies pivot. This has elevated the need for innovative ways to not only speed up the delivery of insights for decisions but also make insights more relevant.

Key to providing speed and relevancy in insights during this time of change has been the advancement of a class of neuromarketing techniques that contain implicit testing. Implicit testing helps you better understand why people do what they do in order for brands to create marketing, innovation and product development plans to disrupt or nudge consumer behaviors.

Implicit testing is a class of neuromarketing techniques that does not require special equipment such as brain-scanning EEG hardware to measure brain activity; physiological sensors to measure arousal; or eye-tracking and facial coding to capture study participant attention. Based on what neuroscientists call "prime-target" response measures, implicit testing techniques can easily and cost-effectively be integrated into almost any research protocol or study.

In 2017, here at InsightsNow, we made a breakthrough in the delivery of implicit techniques with the development of what we call the Implicit/Explicit Test™. This advancement uses neuroscience in two ways. It applies a very powerful driver of human behavior called priming and it measures not only response behavior but also what mode of thinking a participant uses at the point of an experience or situational context where a target is presented for response.

Priming places participants mentally into their own recent product experiences or into situational contexts they frequent and this establishes how participants react to targets. For example, a participant's desire for ice cream (the target) in the context of wintery images (as your prime) will likely be different than if the images are of a hot summer day.

The mode of thinking (implicit or explicit) is ascertained by comparing the speed of response to various calibrated speed-of-response patterns that are known to be implicit (fast) or explicit (slow). To learn more about how the Implicit/Explicit Test works, we welcome you to download "The Implicit/Explicit Test™: Applying Neuromarketing to Enable Better Product Marketing, Development and Innovation."

Since this advancement, we have been rapidly expanding Implicit/Explicit Test's application into the expansive universe of marketing research approaches. To date, we have found innovative and effective ways to apply this technique in food, beverage, pet care, supplements, beauty care, household care, nutritional products, OTC pharma, health care, marketing advertisement and technology studies. Retailers are using this approach to decide the brands and SKUs to place on their store shelves. Ingredient suppliers and flavor and fragrance companies are using it to help their CPG clients build prized products for consumers and shoppers. We are applying it in marketing and media research to know how to nudge or disrupt shoppers, consumers and people navigating health care choices or for government agencies to help people make vaccination decisions.

We invite you to join us in discovering what's the "so what" about implicit testing! To learn more about how to apply the Implicit/Explicit Test™, please download our recently completed e-book that defines eight distinct applications (www.insightsnow.com/8implicitapps). This includes applications to learn how to nudge or disrupt people through product claims, ingredients labeling and label design to assess brand trust and awareness, measure emotions, understand the impact of context and position products to be perceived as relevant and beneficial.

insightsNOW

www.insightsnow.com

Scaling in-house research teams, further education in developments and new capabilities in DIY/in-house research.

Be more independent in survey-building so that more in-house research can be done without spending on third-party and related analysis skills.

Training on advanced survey programming/analytics. I came from a large market research firm where we had a team of programmers and statisticians that would handle everything related to programming an advanced survey and running the data analysis. I am now on a team

SPONSORED CONTENT

VISUAL STORYTELLING: A KEY SKILL OF THE FUTURE?

By Alexander Skorka, Forsta

Thanks to the development of dashboard applications, access to high-quality data-related insights requires minimum time and knowledge. One would think that this development would encourage the use of data and analytics across the board. However, though "digital natives" are quite good at exploiting data, many companies still fail to take full advantage of this opportunity. Why? Well, the challenge isn't to simply introduce new technologies; teams need to adopt new ways of thinking and learn new skills to continuously apply in their day-to-day work. One of these skills is visual storytelling – which will be the most widespread means of using analytics in 2025, according to Gartner.

What distinguishes visual storytelling from classic data visualization?

Visual storytelling tells a story with the help of infographics. The combination of text, images, symbols and diagrams creates communication that is both entertaining and effective. Information and entertainment merge to produce infotainment. Classic data visualization, on the other hand, uses tables and diagrams and often views information and data too abstractly and in isolation. It is thus easy to overlook interrelationship and principles of effect. Visual storytelling is the answer to the ever-increasing flood of information and need to democratize data.

What makes for good visual storytelling?

Like any good story, the visual version starts with an event that is worthy of a more detailed look. This can be, for example, a recent problem or opportunity that has emerged. A good visual story establishes connections between facts, emotions, frameworks, attitudes and courses of action. It thus establishes the causal relationships between all relevant facts. Whether implied, hypothesized or asserted, causal relationships are crucial for a story to work. In other words: In a story, everything happens for a reason.

Stories in the form of infographics can be compared to narrative sequences. They provide a visual, narrative path through the relevant facts. Infographics guide *with just one other researcher and we handle everything from the first sales pitch to the final report delivery.*

Learning R and Python programming for data analytics to marry customer data with survey data to gain a richer understanding of the consumer.

Several shared frustrations around barriers to access related to expensive software and learning curves.

The jobs I'm applying for use their own set of tools that you seem to only learn on the job or by paying the vendor a lot of money.

Better statistical understanding. My experience comes primarily from on the job [training], rather than a statistical educational background.

Improving communication

Historically, storytelling has been a topic of interest for marketing research and insights professionals. So it wasn't surprising to see many responses focus specifically on the ability to use data to tell a story and, ultimately, transform it into consumable insights.

Better ways to show results – to make the information tell a story.

Communicating research basics to non-expert audiences.

The ability to persuade my team that data matters in the work we do. If I can demonstrate the value of my role in our department, then I think our overall success will increase.

Many respondents shared the desire to improve verbal presentation skills.

Toastmasters-style ability to speak well and sound knowledgeable in any situation.

the viewer through the world of data rather than simply throwing them into it. These stories put facts and their interactions in a specific order, making it easier to gain insights and derive measures more effectively.

What effect can visual storytelling have?

1. Visual storytelling is a valuable tool in change management. Storytelling cannot do without a strong problem-solving orientation, so change is already built into the story. A good story promotes improvement and development. It lets the audience know the ways and circumstances under which a change is possible, stimulating the audience to think further.

2. Consistently applied visual storytelling enables data silos to be torn down. A wide variety of departments collect and maintain lots of interesting information. However, this information is trapped in silos and often lacks a holistic view of customers, markets and business processes. Storytelling is directly tied to addressing problems. It inadvertently must include as many perspectives – and thus data – as possible in the analysis from various departments and systems.

3. Visual storytelling is the key to democratizing business data across the enterprise. An ever-increasing number of stakeholders require actionable and decision-relevant information. However, many of these stakeholders are not familiar with data and analytics. By using infographics, complex issues can be illustrated to these users in a way that is easy to understand and reliable in terms of interpretation. This leads to data being used more widely and frequently in decision-making processes.

4. Visual storytelling fosters collaboration across the enterprise. Unlike abstract diagrams, stories allow us to talk about insights and solutions. They help us understand causes, effect relationships and principles and, more importantly, share them with others. This results in collaboration that better supports teams to create innovative solutions.

Summary

Used correctly, visual storytelling is a key skill that all employees need to learn. This is because visual storytelling supports change processes, helps break down data silos and promotes the democratization of data and collaborative decision-making processes.

Forsta

www.forsta.com

Interpersonal communication also made the list.

> *As a middle-aged white male, getting better at doing research with those who identify differently than I do.*
>
> *Building authority/courage in asking peers/other teams to take on tasks – easy to do for direct reports, not so easy to do for people of the same title level or higher than you.*

Leadership

Leadership and management were two common themes, with many respondents sharing how their career would benefit from executive coaching, leadership training and people-management skills. And after more than a year of remote work and limited in-person contact, it wasn't a surprise to see some individuals sharing the need for skills around "leading in a virtual environment."

One respondent highlighted how important forward-thinking leaders truly are:

> *We are at an inflection point. Until our executive director retires, our department will make no further progress in transforming into an insights function.*

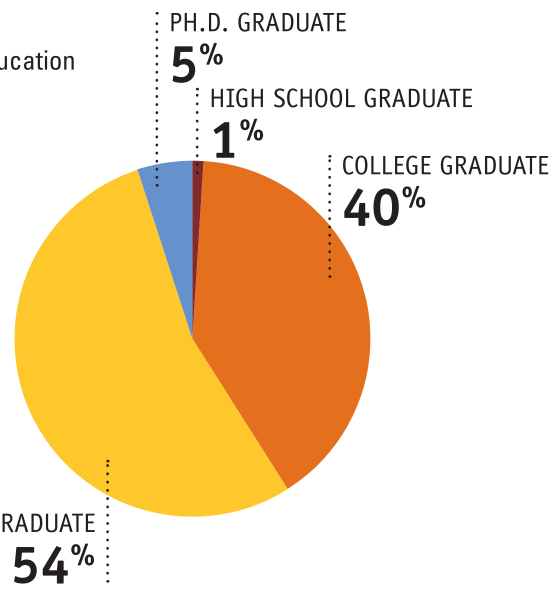
Presentation and strategy

Presentation skills and strategy – which represent a gray area where soft skills meet hard – were among the common skills researchers said would be beneficial to their careers.

While many general presentation soft skills were named – communication, project management and public speaking – others called out hard skills, such as the need to improve dashboards, user interfaces and master data visualization software and techniques.

Regardless of the focus, it seems the hope is to increase the actionability of research findings.

What is the highest level of education you have completed?



INDUSTRY INSIGHTS

highlighting the increased need for companies to keep pace with market shifts. In the world of finance and digital investing, it was a particularly wild year. For example, the drama around the GameStop stock and Robinhood app fueled a media firestorm. However, very few Americans have actually made social media-driven stock purchases. In fact, 75% say not only have they not purchased GameStop or similar stock but they have no interest in ever participating in community-driven trading events.

Bitcoin also broke new investment records during the pandemic, though opinions on Bitcoin are mixed. Among those who've heard of it, 22% say it's a good investment opportunity but not as useful as a currency to purchase goods and services. However, Bitcoin owners are even more bullish on its growth path now than they were three years ago; 64% say they think Bitcoin will be worth significantly more five years from now than it is today, up from 47% in 2018.

The bottom line is this: Companies across different industries will be required to pivot to get ahead of market shifts and will need to leverage different market research solutions to keep pace with customer needs and trends – from flash polls, to brand tracking, to industry tracking and more.

Accurately anticipating customer needs with speed

With a pressing need to get closer to customers and anticipate needs, organizations are rethinking approaches to market research and considering new technology. According to a new McKinsey Global Survey of executives, 49% said increasing use of advanced technologies for business decision-making is here to stay and echoed a familiar finding: Companies that embraced the use of advanced technologies and speed in experimenting and innovating outperformed those that did not. We wanted to lead by example and used our own brand and market insights solution to embark on a bold change – rebranding and relaunching our company into Momentive, an agile experience management company.

Consumer behavior and business models will continue to shift at an accelerated pace and companies need to prepare. The silver lining is that there is new technology to help you understand what your customers care about now and what they'll need tomorrow, which will place you well ahead of your competitors.

Want to learn more? Visit www.momentive.ai/insights.

momentive

www.momentive.ai

Continued education

Numerous respondents reported that continued education would be beneficial to their career – which some may find surprising, given that 54% of respondents hold a master's degree and 5% have a Ph.D.

So what are they interested in learning? Several mentioned the need for qual-specific training, namely moderating.

> *Right now, I am seeing a big need for RIVA or Burke's certification in qualitative moderating. Many organizations are requesting someone who is RIVA-trained.*
>
> *I just completed moderator training and managed my first group. I intend to continue on this trajectory.*
>
> *I think we'll always need qualitative research, but even that will become more complicated and begin to demand people with advanced degrees (which I do not have).*
>
> *Burke needs to come back to New York! We need affordable qual training!*

Other responses highlighted the demand for training outside of marketing research and insights – including legal, pharmaceutical, financial, UX certificates, international business, foreign language, journalism and business – in order better meet the needs of often varied client-side roles.

> *B2B marketing skills (SEO, etc.). My role was expanded beyond insights to cover marketing and my career is insights.*
>
> *My company is currently investing in my education (MBA), which I believe is of great benefit.*

Travel reimbursement was also mentioned alongside educational opportunities, reminding us that while much can be accomplished in the virtual realm, many researchers still value in-person learning.

Eyes on retirement

We'd be remiss to not include the responses from those nearing the end of their careers. While you undeniably can teach old dogs new tricks, some pre-retirement researchers feel new skills aren't worth the investment.

> *I am close enough to retirement that additional investment of skills by me won't be very useful.*
>
> *I'm actually in the pre-retirement stage, so it's hard for me to answer this one.*

TAKEAWAYS FOR VENDORS

- **Clients worry about panel data quality.** Improve your data-quality measures, especially panel sample and data, and communicate your efforts to client-side researchers so they can feel confident in the data you're gathering for them.
- **Clients fear falling response rates.** Corporate researchers see a need for more engaging, more entertaining ways for respondents to take surveys. If you offer those tools, let them know.
- **Clients seek diversity.** Reflecting the societal movement toward diversity, equity and inclusion (DEI), corporate researchers are increasingly in search of vendors who have diverse management and staff and also who are skilled at researching issues surrounding DEI.
- **Clients need help with storytelling.** Q Report respondents wished for their vendors to help them build narratives from research data, to make the complex simple and facilitate socializing findings internally.
- **Clients could use a partner.** Especially in light of the pandemic, corporate researchers report being inundated with internal project requests and are facing these increased workloads with smaller staffs after COVID-induced furloughs or layoffs. A vendor partner who helps them weather this storm will lay the groundwork for a longer-term relationship.

WebMD Medscape Market Research Services

We offer unparalleled reach to the largest, most engaged and highest value network of physicians and prescribing health care professionals for your **quantitative** or **qualitative** research.

WHY US?

- ☑ We offer you what no other healthcare market research company can: **engaged healthcare professionals who are regularly accessing Medscape for clinical content. Our market research team leverages these Medscape members to provide you with research solutions that deliver high quality results.**
- ☑ We leverage our first and third party data e.g. prescribing behavior, work setting, therapeutic areas to deliver **advanced targeting capabilities** to get you the precise respondents that you need.
- ☑ Medscape develops a relationship with physicians typically during med school and maintains that relationship with them throughout their career.

WebMD Medscape
WebMD Professional

Market Research

Need a quote?

Click here or contact us at www.medscapemarketresearch.com

RESEARCHERS SEEK FLEXIBILITY, DIVERSITY

By Emily C. Koenig >> Quirk's Media

One of the main goals of Quirk's annual Q Report is to better understand the client-side researcher and see what's on their minds. Since the beginning of the pandemic, the pace of change has begun to increase, prompting us to focus on a few topics – flexibility, diversity and shifts in employment – that hit the global spotlight in 2020 to see how they have impacted marketing research and insights professionals.

As we've done in past reports, we're (mostly) letting the data speak for itself, highlighting interesting tidbits and respondent comments throughout. You will also find a few data points from years past to show how far we've come and highlight what has – and hasn't – changed in the last few years.

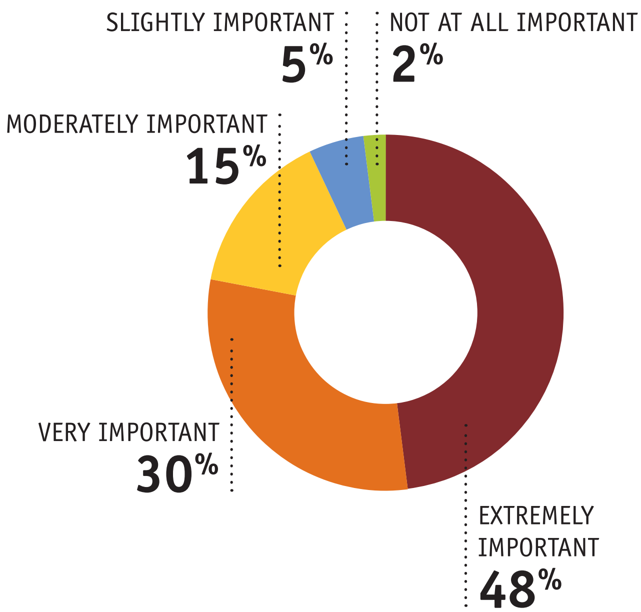
The 2021 edition of Quirk's annual survey received responses from a total of 816 full-time (defined as 35+ hours per week) client-side insights professionals. The survey has more to offer than we can include in this report. If you are interested in seeing a breakdown of compensation for all job titles, including crosstabs by age, gender, location, industry and more, visit URL.

So what does the research industry look like in 2021?

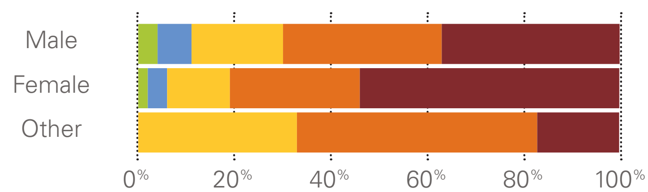
Importance of flexibility

With work from home trending, we asked respondents, "How important is it to you that your organization allows the flexibility to work remotely either partially or fully?" A whopping 78% said this is extremely important or very important. Interestingly, 54% of women

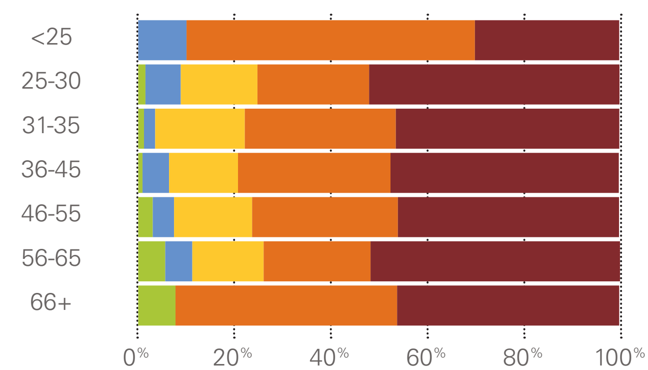
How important is it to you that your organization allows the flexibility to work remotely either partially or fully?



IMPORTANCE BY GENDER



IMPORTANCE BY AGE



said it was extremely important as compared to only 37% of men.

Diversity

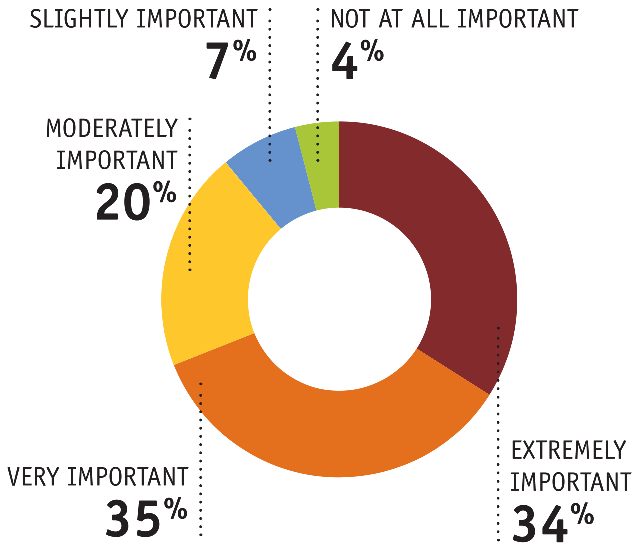
In 2020, like many industries around the world, research and insights put a heavy focus on diversity. When asked, “How important is it to you that your organization has a commitment to diversity in the workplace?” a combined 69% of respondents said extremely important or very important.

When looking through this year’s verbatims, many respondents noted the need for more diversity and inclusion efforts, both in terms of the research being conducted and the profession:

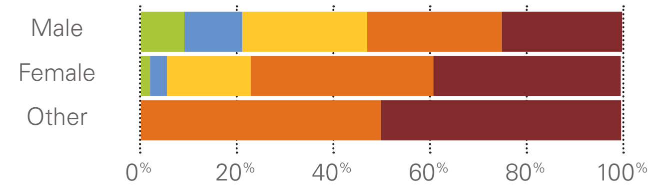
> *More diversity and inclusion-based research. Using more vendors that focus on diversity markets or are diversity-founded.*
>
> *After investing year after year in digital analytics, our new CMO has made an investment in an additional analyst on the market research side. We look forward to hiring this new person in the next year. This person will focus on our audience of the future (younger and more racially and ethnically diverse).*
>
> *The profession has to be more encompassing of a diverse workforce.*

2020 also saw the launch of several new diversity-focused industry organizations: Colour of Research (https://www.colourofresearch.org), a global community driven to bring about more diversity in the research industry; Insights in Color (https://www.insightsincolor.com), a community for multicultural market research and insights professionals; and Out in Research, a group championing LGBTQ+ diversity within the industry. WIRe in Color (https://www.womeninresearch.org/wire-in-color), which launched in 2018, is another industry group focused on racial and cultural diversity and equity.

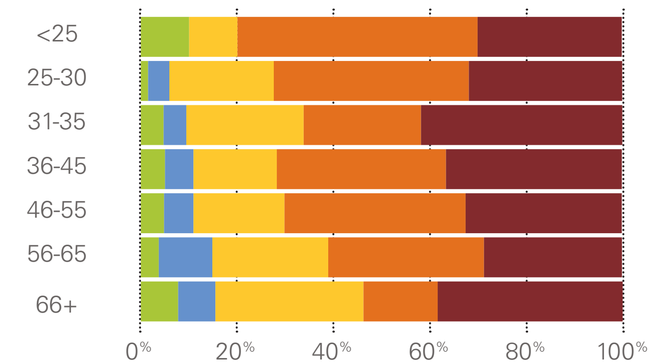
How important is it to you that your organization has a commitment to diversity in the workplace?



IMPORTANCE BY GENDER



IMPORTANCE BY AGE



Changes in employment

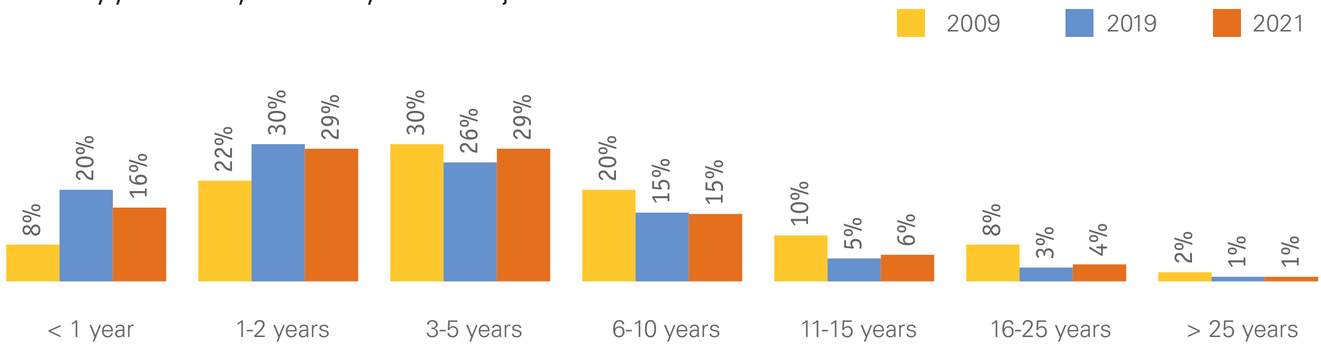
Back in 2010, a combined 60% of respondents said it was very unlikely, unlikely or somewhat unlikely that their companies would hire additional employees. In 2019, months before the COVID-19 pandemic, that number sat at 48%. This year, it fell to 43%.

But, are researchers looking for new jobs? According to our survey, only 8% said they were very likely to seek employment at a different company this year. This may be related to the fact that the percentage of researchers who are new to their positions is up, with 16% reporting they have been in their current job for less than a year, as compared to 13% in 2019 and 8% in 2009.

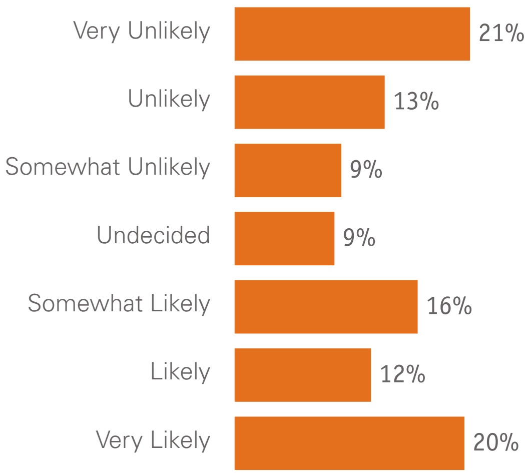
Several respondents shared their experiences regarding layoffs, employment challenges and victories:

> *I was only laid off two months and was very busy interviewing the whole time, and was on the final round with several companies when I accepted an offer.*

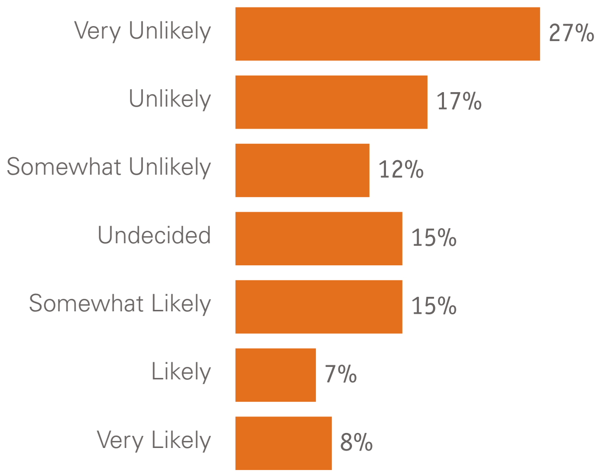
How many years have you been in your current job?



How likely is it that your company will hire additional permanent market research employees in the next 12 months?



How likely is it that your company will hire additional contract research employees in the next 12 months?

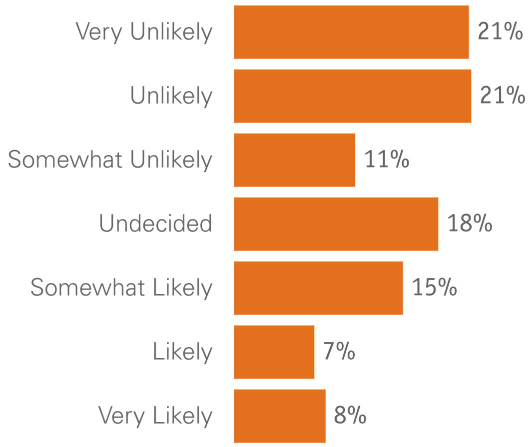


I've been laid off twice from organizations that were obviously not committed and convinced of the value received, however I'm currently with an organization that highly values insights and leadership expects them in all strategic and tactical plans. But if I could do my career over again I would choose another profession because those layoffs were huge setbacks to my career and life that I'm still paying for.

Wouldn't be surprised if they are trying to do away with research. None of our positions are ever backfilled when someone leaves. Everyone is terribly overwhelmed with work and unsupportive leaders.

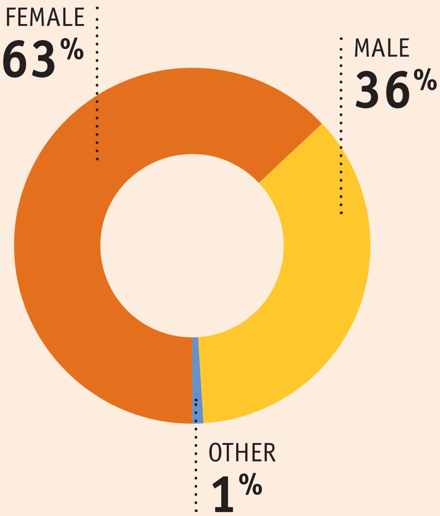
I feel underpaid on the client side and have considered returning to the vendor side.

How likely are you to seek employment at a different company this year?

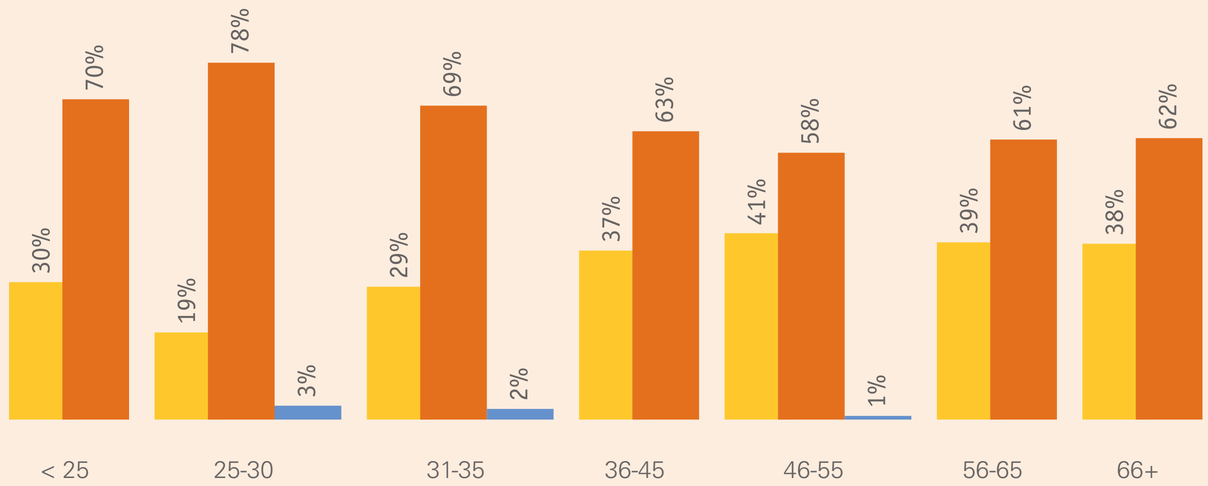


WOMEN HOLD THE MAJORITY

GENDER



AGE IN YEARS BY GENDER



I'm in a position where we don't have enough business to hire a new person but I can't take on much more business without another person. It is a Catch-22.

I was hired six months ago to revamp the MR function at my company. There is great enthusiasm for more and better research, yet also a fair amount of reluctance to let go of the way things have been done for decades (without consistent professional leadership in the MR function). I'm content and pleased with the level of enthusiasm for better research, though there are still challenges ahead.

I love [my job]! I have to motivate myself but the idea of gleaning some type of learning from talking to a customer, reading over survey results, etc., makes me happy and keeps me going.

METHODOLOGY

The 2021 Q Report work life and salary and compensation study of end-client/corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research subscribers of Quirk's. The survey was fielded from June 10 to July 16, 2021. In total we received 1,951 usable qualified responses of which 816 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.16 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

CALENDAR OF EVENTS

can't-miss activities

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.

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

IQPC will hold its CX Exchange Travel and Hospitality as a virtual event on **September 21-22.** Visit bit.ly/3cC7DZt.

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

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 O2 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.

IQPC will hold its CX Exchange Retail as a virtual event on **October 18-19.** Visit bit.ly/3iBIJNH.

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

The Insights Association with hold CRC 2021 on **October 20-22** in **Dallas.** Visit www.insightsassociation.org/conference/crc-2021.

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.

The Strategy Institute will hold its 2021 People Analytics Summit on **December 7-8** as a virtual event. Visit www.peopleanalyticscanada.com.

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

The 2022 Quirk's Event – Chicago will be held on **April 11-12, 2022,** at the Sheraton Grand in **Chicago.** Visit www.thequirksevent.com.

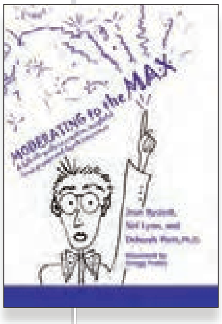
GreenBook will hold its IIEX North America event on **April 19-20, 2022,** in **Austin, Texas.** Visit events.greenbook.org/iiex-north-america.

The 2022 Quirk's Event – London will be held on **May 4-5, 2022,** at the InterContinental London O2 in **London.** Visit www.thequirksevent.com.

Event details as of August 17, 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 Emily Goon at emily@quirks.com. For a more complete list of upcoming events visit www.quirks.com/events.

ESSENTIAL READING FOR RESEARCH PROFESSIONALS

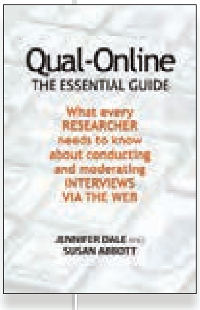


Moderating to the Max

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

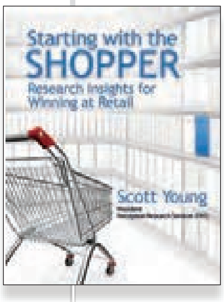


Qual-Online: The Essential Guide

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

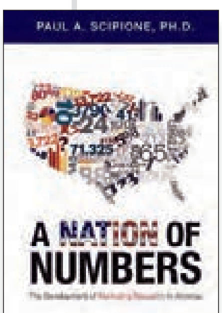


Starting with the Shopper

Research Insights for Winning at Retail

Actionable insights, case studies and "lessons learned" from thousands of studies conducted by Perception Research Services, a global leader in packaging and shopper marketing research. What works in store, in home and online, and how best to apply shopper research to drive and measure success.

136 pages, 7x 9, full color; 978-1-941688-23-6 $39.95 paper



A Nation of Numbers

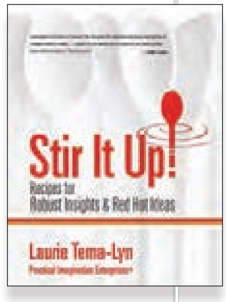
The Development of Marketing Research in America

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

Stir It Up!

Recipes for Robust Insights & Red Hot Ideas

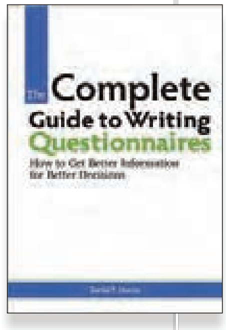


From time to time, every moderator, meeting chairman, or in-depth interviewer needs fresh ideas to jazz up a tired group or reenergize a flagging meeting. Here are 50 fresh ideas for exercises in an easy-to-use cookbook format. Organized by category, from Ice Breakers to Idea Developers each "recipe" (exercise) is presented with a brief description, an estimation of time required, a list of materials needed, instructions for how to do it, and useful tips.

140 pages, 7x9, 978-0-9830436-3-8 $24.95 paper

The Complete Guide to Writing Questionnaires

How to Get Better Information for Better Decisions

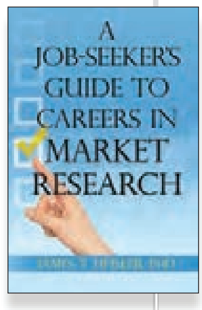


A comprehensive framework for creating questionnaires from planning research to support decision-making, conducting qualitative research, and planning the questionnaire before you begin writing questions, with guidelines to make questions clear, answerable, easy, and unbiased for the three most common tasks researchers ask respondents, and how to properly pretest a questionnaire.

220 pages, 7x10, 978-0615917672 $54.00 paper

A Job-Seeker's Guide to Careers in Market Research

How to Decide if a Career in Market Research is Right for You



An authoritative guide to the market research industry at the beginning of the 21st century, its size and scope, what value it provides, who works in the field, who uses it and for what decisions, the market research process, common methodologies, growth prospects for the industry, and more. The book explores market research as a career choice—skills, education, and training; how to get that first job, moving upward, potential earning power, success profiles, and stepping stones to related careers.

174 pages, 6x9, 978-1-941688-31-1 $34.95 paper

Buy direct and save!

You will always find **the best pricing** at our website,

PMP **paramountbooks.com**

Most PMP books are also available for Kindle, Nook and iPad readers.

For more information on any title listed here or to see a complete list, visit our website or call **607-275-8100.**

INDEX OF ADVERTISERS

This issue of Quirk's is made possible by our valued advertisers. Their ongoing support - along with that of the other companies and organizations that market themselves on our Web site, e-newsletter and related outlets - helps us bring you Quirk's and all of its associated resources. When you contact the organizations listed below, let them know you saw their ad in Quirk's!

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

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

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

10 minutes with...

Tina Nathanson

Senior Manager, Market Research and Analytics, Quest Diagnostics

"These are table stakes and if you want to expand, enable a culture of learning."

What led you to a career in marketing research?

I got into research by accident. As an economics major, I considered working for the U.S. Government, either at the U.S. Census Bureau or for World Bank. The summer before my senior year, I interned for the New York City Department of Human Resources. My job required me to go to SSI centers throughout N.Y.C., read case files and interview case managers for a project that would culminate in a meeting in Albany, N.Y. Through the process, I realized that I enjoyed telling stories through data, so much that my HRA director invited me to Albany to present the findings to his management as I was the "voice of their customer." It was at that moment that I found my love of research. I had to rearrange my senior year's course schedule to add a graduate-level data analysis class, offered by my favorite stats professor from my freshman year. He mentored me my last semester, encouraging me to move away from the public to the private sector because I had "a marketer's personality." Shortly after graduation, I accepted a full-time job at a small market research firm, Moskowitz Jacobs, working for the legendary Howard Moskowitz, and the rest is history.

Do you have any tips for researchers looking to gain internal buy-in for expanding insights beyond the marketing department?

Be curious, take risks and have fun.

It is not going to happen overnight; it starts with taking baby steps to get a seat at the table of others in your company. I've spent most of my corporate career in highly matrixed organizations and in most instances, I was already working with product and/or R&D as well as branding and strategy teams. These are table stakes and if you want to expand, enable a culture of learning. Increasing awareness of your team through visibility via snackable insights – just tell your story over and over to "seed the need."

In my experience, HR, operations and even IT teams value storytelling through data. The next time you participate in an all-hands-on meeting or quarterly earnings read out, be receptive and listen. Provide the right amount of engagement to ensure the new team understands what they're investing in. With the right approach, insights teams can serve as transformational leaders.

Talk about your greatest achievement within marketing research to date.

To dovetail on what I just shared, I was a cross-functional research leader in my last corporate marketing research role. My team led the charge on creating three insight communities with consumers, financial influencers and employees which not only saved us time and money, but also gave us permission to triangulate insights across multiple audiences with corporate communications, digital marketing, social media, HR, IT, operations and other teams. Cycle time on deliverables were reduced by 50+% and we had a 400% ROI from our initial investment.

What is it about marketing research that interests you the most?

I love that I can lead and guide my colleagues from eyes shut to eyes wide open.