

QUIRKS

For marketing research and insights professionals

PROFIT BEFORE PEOPLE

FIGHTING AN EPIDEMIC OF BURNOUT
IN THE RESEARCH INDUSTRY

PLUS

Improving how we ask
demographic questions

How to do agile the right way

Three approaches to
researching price

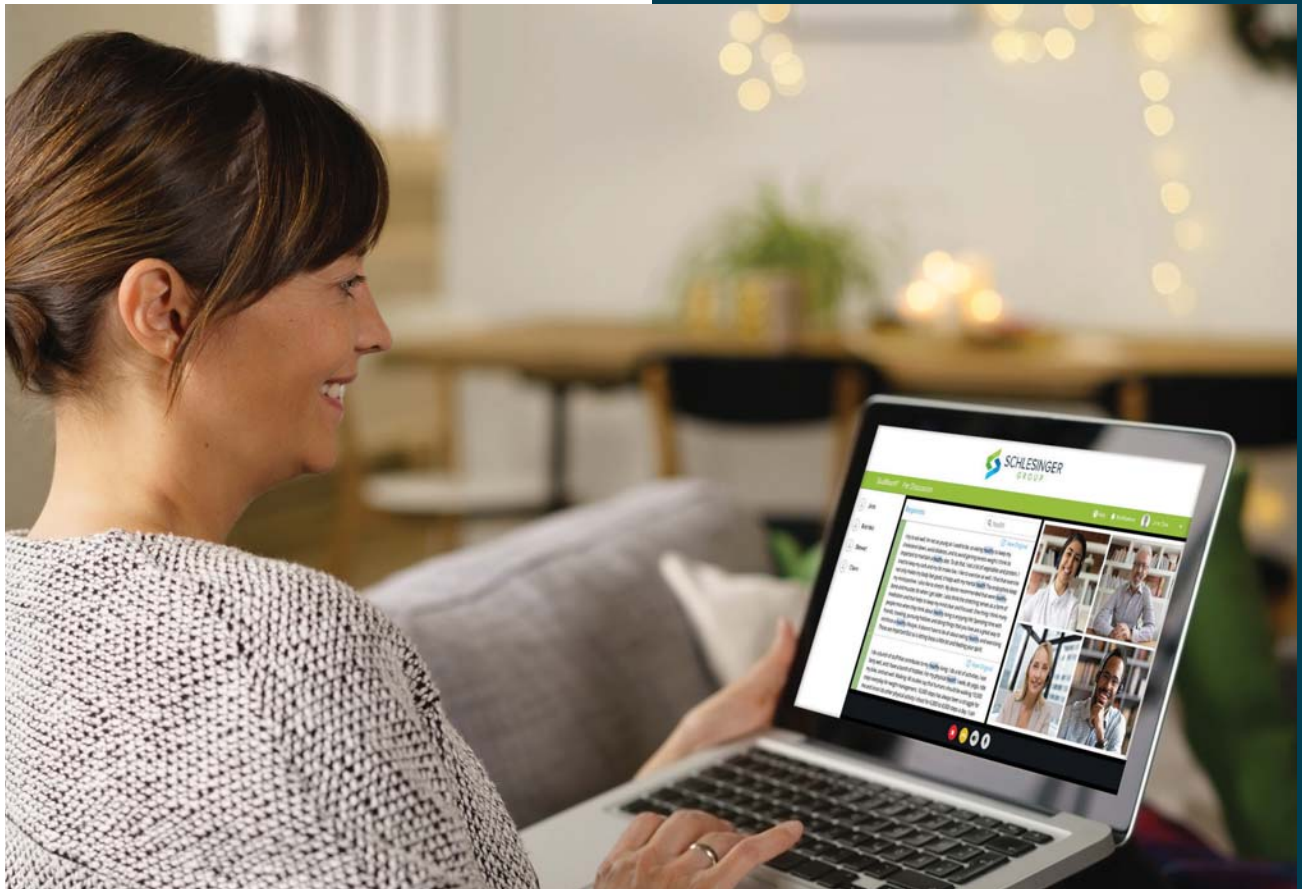


ADVERTISING SECTIONS

10 Top Brand/Image Research Companies

12 Top CPG Research Companies

Quirk's Marketing Research Review
January/February 2022
Volume XXXVI Number 1
www.quirks.com



QualBoard®

QualMeeting®

Over The Shoulder®

QuantText™

Digital Qual
Made Smarter,
Faster & Easier.

Researchers who seek **better answers** choose **smarter tools**.

- ✓ Online Discussions
- ✓ Online Focus Groups & IDIs
- ✓ Mobile Ethnographies
- ✓ Hybrid Qual+Quant
- ✓ Online Usability & Eye Tracking



Vast Global Panels

Predictive Models

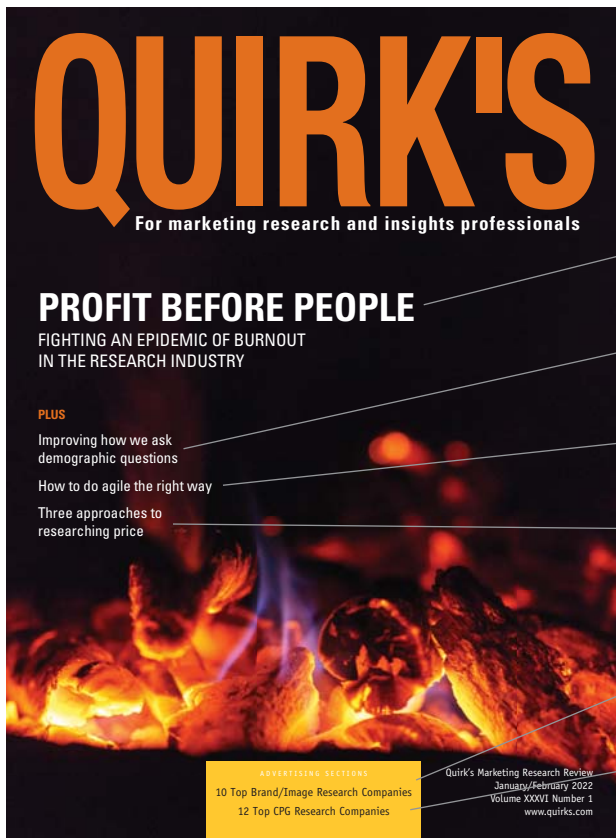
Do-It-For-Me

Advanced
Programmatic
**Survey
Solutions**

Harnessed by
our passionately
client-centric
humans for
**quality, speed,
and reach.**

CONTENTS

Quirk's Marketing Research Review
January/February 2022 • Vol. XXXVI No. 1



page
48

page
60

page
52

page
40

page
36

page
78

DEPARTMENTS

- 6 Click With Quirk's
- 8 In Case You Missed It...
- 12 Outlook 2022
- 30 Survey Monitor
- 36 10 Top Brand/Image Research Companies
- 78 12 Top CPG Research Companies
- 83 Calendar of Events
- 85 Index of Advertisers
- 86 Before You Go...

Quirk's 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

ON THE COVER

- 48 Profit before people
The dirty secret of the research world?
By Stephanie Rowley

- 70 Going one better
Adding budget considerations into choice-based conjoint
By Steve Cohen

FEATURES

- 52 Haste without waste
How to do agile research the right way
By Bill Murray
- 56 Better for everyone
Philips Healthcare put human experiences at the heart of research into cardiology care pathways
By Amy Pratt and Laura Hunt
- 60 Fairer and better
Improving how we measure basic demographics
By Jon Puleston

- 74 Driving interest
Gauging the future of electric and autonomous vehicles
By Tim Grainey and Renah Wolzinger

COLUMNS

- 10 Trade Talk
Prediction: these things might happen
By Joseph Rydholm
- 40 Data Use
Three survey-based methods for pricing research
By Bryan Orme and Keith Chrzan

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



Download the Quirk's iPad, iPhone or Android app to view this issue.



An interactive downloadable PDF of this magazine is available at www.quirks.com/pdf/202201_quirks.pdf.



Follow us on Twitter @QuirksMR.



**VIRTUAL
AND
IN-PERSON
COURSES
AVAILABLE!**



BURKE INSTITUTE

a division of Burke, Inc.

SEMINAR DATES & FEES FOR JANUARY THROUGH JUNE 2022

RESEARCH METHODS

RM01 - Practical Marketing Research

VIRTUAL: \$2,925
Jan 25-28 Apr 26-29

RM03 - Designing Effective Questionnaires:

A Step by Step Workshop
VIRTUAL: \$2,925
Feb 15-18 May 10-13

RESEARCH APPLICATIONS

RA01 - Applying Research & Insights: *Customer, Brand, Product*

VIRTUAL: \$2,575
Feb 22-24 June 21-23

RA03 - Market Segmentation: *Designing, Implementing, Activating*

VIRTUAL: \$2,925
Mar 29-Apr 1

NEW

RA04 - Fundamentals of Pricing Research: *Strategies & Analytical Techniques*

VIRTUAL: \$2,575
May 24-25

COMMUNICATION

C01 - Writing & Presenting Marketing Research Reports: *Insights, Storytelling, Data Visualization*

VIRTUAL: \$2,925
Feb 1-4 May 17-20

DATA ANALYSIS

DA02 - Tools & Techniques of Data Analysis

VIRTUAL: \$2,925
Mar 8-11 June 7-10

DA03 - Practical Multivariate Analysis

VIRTUAL: \$2,925
Apr 5-8

QUALITATIVE

Q01 - Moderator Training: *Focus Groups & IDIs*

VIRTUAL: \$2,925
Feb 8-11
IN-PERSON (Cincinnati): \$3,175
May 3-5

Q02 - Specialized Moderator Skills for Qualitative Research Applications

VIRTUAL: \$2,925
Mar 1-4
IN-PERSON (Cincinnati): \$3,175
June 14-16

Q03 - Next Generation Qualitative Tools: *Social Media, Online Communities, Virtual Research Platforms*

VIRTUAL: \$2,575
Mar 16-17

NEW

Q04 - Building Better Facilitation Skills: *Activation, Innovation, Co-creation*

VIRTUAL: \$2,575
Mar 22-24 June 28-30

BurkeInstitute.com
800.543.8635 or 513.684.4999

© 2022 Burke, Incorporated. All rights reserved.

Please note all courses can be customized to create virtual programs specific to the needs of your organization.



// Noted Posts

... get published

Write for Quirk's in 2022

At Quirk's, we are always looking for interesting, objective articles on all aspects of marketing research and we welcome articles from outside sources – client-side or vendor-side. Quirk's is the place to get your case study, technique or how-to article in front of an audience of active client-side marketing research professionals.

Writing for Quirk's shows the world you are an engaged thought leader. In addition, you gain long-term visibility in our online archive. In fact, in the past four years, Quirk's top article has received more than 317,000 views!

View Quirk's author guidelines and the 2022 editorial calendar at <https://www.quirks.com/pages/write-for-quirk-s>.

... webinars

Wisdom Wednesday

Explore MR topics, sharpen your skills and stay current on industry trends with Quirk's Wisdom Wednesdays! Each Wisdom Wednesday will feature industry experts presenting on a variety of topics. During the webinars, attendees are encouraged to ask questions and interact with speakers via the platform's live, text-based chat feature. To view the 2022 schedule and register, visit <https://www.quirks.com/events?title=webinar>.

If you're interested in partnering with Quirk's to produce a webinar, send an e-mail to info@quirks.com.



// E-newsworthy

Tips for designing and conducting DEI research

<https://bit.ly/3s2a8NB>

How to uncover feasibility for niche B2B market research sample

<https://bit.ly/3EDZEai>

5 tips for turning digital learnings from 2020 into consumer strategies for 2022

<https://bit.ly/31JuzmZ>



Quirk's Blog

Do consumers read customer reviews?

<https://bit.ly/3pfJ4sM>

After the pandemic: E-commerce, subscriptions and services

<https://bit.ly/3nbryTU>

Diversity and inclusion in research and insights

<https://bit.ly/3LU9ZZ6>

Research Industry Voices

3 lessons on innovation from Dollar Shave Club

<https://bit.ly/3pGgGOL>

Staying agile and staying kind: Conducting in-person qual in the age of COVID-19

<https://bit.ly/3y3Sv0h>

Can there be more than one right answer? Avoiding bias in research

<https://bit.ly/33gbNVR>

Research Careers Blog

Providing and managing workplace flexibility: An introduction

<https://bit.ly/3pGv3CM>

How a zero-sum mind-set can undermine workplace negotiations

<https://bit.ly/3ydoZFN>

Engaging effectively: A guide to social media platforms

<https://bit.ly/335Fiin>

NEW RELEASE



cx inspector

Interactive, customizable text analytics that's now more powerful and uncovers deeper insights quickly

Process open-ended comments instantly.

Visualize results you want to see easily.

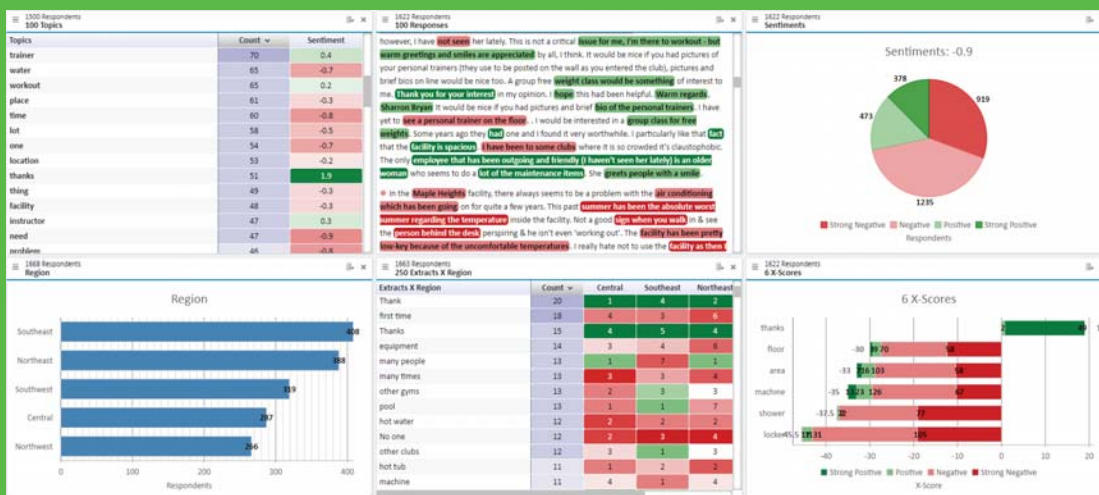
Click through to find the individual comment.

Topic Analysis and Sentiment Analysis.

Filter results by any variable to compare data.

Save specialized templates to apply to other datasets.

Making qualitative analysis easier



Learn more about CX Inspector at GoAscribe.com or call 877.241.9112 x55.



In Case You Missed It

news and notes on marketing and research

... financial services research

For banking, digital is preferred – except when it’s not

Nearly all consumers and businesses now do at least some of their banking via digital channels and plan to do so permanently, further accelerating a trend that emerged in 2020 as the pandemic unfolded, according to research released by Citizens Financial Group. But while the results highlight a sweeping change in banking habits, they also ratify the enduring importance of human interaction in more complex matters.

According to Citizens’ second annual Banking Experience Survey, nine out of 10 consumers (90 percent) and businesses (86 percent) use digital banking channels, up from 85 percent and 71 percent, respectively, in July 2020.

The nationwide survey of consumers and business leaders found not only that widespread digital adoption is here to stay, with at least 70 percent of consumers and business leaders saying it is permanent, but that customers are increasingly comfortable in sharing their personal data with their banks.

However, the survey also found that human interaction – provided either in person or via virtual channels – remains essential when it comes to getting financial advice and for executing more complex transactions, as two-thirds of both consumers and businesses still prefer to tap human expertise when getting any financial advice.



... brand research

Car marques dominate list of internet’s most misspelled brands

A study by credit broker Money.co.uk found that South Korean automotive manufacturer Hyundai is one of the most misspelled brands on the internet, with an average of 605,000 incorrect global online searches per month. Common search variations for Hyundai include “Hundai” (581,000 monthly searches) and “Hiundai” (24,000 monthly searches). Overall, seven out of the 20 most misspelled brands on the internet are from the automotive industry, according to the study.

In second place is Lamborghini, with an average of 365,000 inaccurate online searches a month for the luxury sports car giant. Those searching for Lamborghini are typically misspelling it as “Lamborgini” (351,000 monthly searches) and “Lambogini” (14,000 monthly searches).

Ferrari is in third position. The misspelled “Ferari” is searched online an average 123,000 times a month.

French cognac producer Hennessy (“Henessy,” “Hennessy,” “Henesy” – 95,100 combined) and Dutch beer producer Heineken (“Heinken” – 90,000) respectively rank fourth and fifth.

*Fieldwork is here to help make your
next project a success! In-person, online,
or anything in between, we're here to assist.*



#facetofacemrx

focus on the research.
we'll do the rest.

fieldwork.com

ATLANTA | BOSTON | CHICAGO-DOWNTOWN | CHICAGO-FLEX | CHICAGO-O'HARE | CHICAGO-SCHAUMBURG | DALLAS | DENVER
FORT LEE, NJ | LA-ORANGE COUNTY | MINNEAPOLIS | NEW YORK CITY | PHOENIX | SAN FRANCISCO | SEATTLE | ANYWHERE

U.S. LOCAL & NATIONAL RECRUITING | GLOBAL FIELDWORK MANAGEMENT | ONLINE/IN-PERSON



Prediction: these things might happen

I feel like the pandemic has almost rendered moot any attempt to predict the future, especially in the business world. One new variant and the markets go crazy and the world shifts on its axis – at least for a while. (That’s an aspect of the stock market that’s always confused me, by the way. The experts chide individual investors to keep a cool head and never react with emotion and yet why does it always seem like it’s the pros who freak out and dump their holdings at the first hint of bad news?)

I digress.

With the above caveat about the merits of crystal ball-gazing in mind, I’ve been reading a ton of the forward-looking content that typically comes out around the start of a new year. Forrester’s Predictions 2022 report (available free at the firm’s website; registration required) has a handful that stuck out to me as being more reasonably possible, courtesy of being informed by Forrester’s broad business purview. (The titles below are mine; Forrester’s are way more professional-sounding.)

Get over yourselves and meet your needs. Forrester says that while consumers are still willing to cut companies some pandemic-related slack, many feel that businesses should have things squared away by now and will grow increasingly impatient with firms that struggle to go fully digital.

“[C]onsumers also expect companies to double down on building a successful and sustainable digital customer experience. Fifty-six percent of U.S. consumers believe that companies should have figured out how to handle pandemic-related disruption by now. Fifty-eight percent of consumers expect

companies to have marshalled their digital resources so they’ll be able to respond better if the country is plunged into another public health emergency.”

B2B you and me. While B2B firms know that customer insights are key to an effective sales process, Forrester predicts that 75% of efforts to create automated, personalized engagement won’t meet ROI goals because of inadequate buyer insight.

“Seventeen percent of B2B buyers said that the competence demonstrated during the buying process was the most significant driver of purchase choice, far ahead of the relationship with the sales rep (5%) or customer references (6%).”

And yet, the company says, “...only 10% of B2B organizations will identify metrics to measure the value created for buyers during the buying process.”

We got this. Instead of depending on (read: waiting for) governments to act on issues related to environmental, social and corporate governance, companies will take it upon themselves to tackle problems, with more substantive rather than merely performative measures, since they know consumers are watching.

“Forrester Analytics Consumer Technographics Benchmark Survey, 2021, shows that year over year, more adults in the U.S., Canada, the U.K., Germany, Spain and Italy regularly purchase from brands that align with their personal values. The highest jump occurred in the U.S., with a rise from 40% in 2020 to 48% in 2021. This number will surpass 50% in 2022 – spurring brands to take actions like never before.”

Accessibility pays. With a share of a predicted \$10 billion in spending on accessibility in the U.S. and Canada at stake, CX groups within tech firms will



©Clare Pix Photography www.clarepix.com

Joe Rydholm can be reached at joe@quirks.com

have to boost their focus on areas like accessibility and privacy.

“More organizations buying tech will commit to accessibility in 2022, due to pressure created by the increasing number of digital accessibility lawsuits and the increasing number of firms creating diversity and inclusion programs (26% did for the first time in 2021). Tech vendors and services firms will need to follow suit and make similar commitments if they want a piece of the \$10 billion pie.”

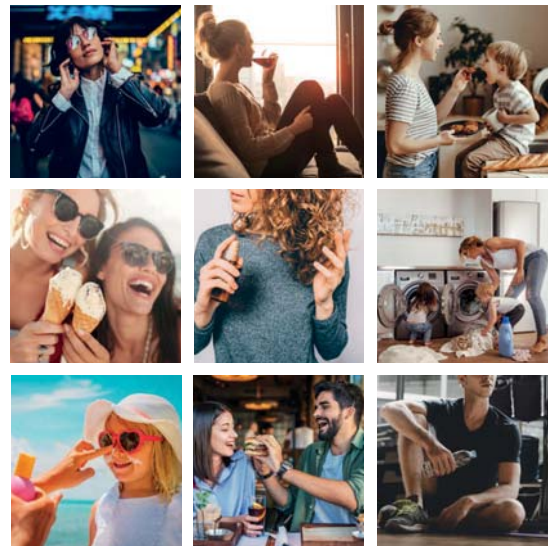
Don’t blame the (hybrid) messenger. While companies will talk a good game about supporting a hybrid work model, their actions will speak otherwise – and contribute to failure.

“Leaders will claim support for a hybrid model but still design meetings, job roles and promotion opportunities around face-to-face experiences. When it’s clear that productivity is suffering, these same execs will blame hybrid work rather than looking in the mirror at the real culprit. A smaller number of failures will come from the 30% of companies that insist on a fully in-office model, only to find that employees simply won’t have it. Attrition at these firms will rise above their industry averages – monthly quit rates will rise to as high as 2.5% for as much of 2022 as needed until executives feel the pain and finally commit to making hybrid work ... work.”

95% of products fail in the first year, make sure yours isn't one of them.

Lean on the experts at Curion for the insights you need.

Curion has partnered with the largest brands in the world to bring thousands of products to market, helping over 200 brands become #1 in their category.



QUIRK'S

OUTLOOK

2022

COMMENTARIES BY INDUSTRY LEADERS ON THE YEAR AHEAD

Welcome to Quirk's Outlook 2022! We asked research companies to offer up their viewpoints on a range of topics – from fading brand awareness in COVID-19 America to the demands of DIY – to delve into some factors that will make an impact in the year ahead.

WEVO discusses how human-augmented AI will transform UX research. InsightsNow explores the newness effect and how it can be harnessed to create excitement with consumers and enhance your brand. Decision Analyst tackles the issue of fading brand awareness in COVID-19 America and whether it's due to the pandemic or marketing blunders. EyeSee reveals how to bust sustainability myths to win big at the shelf with sustainable products. InnovateMR provides insight into the demands of DIY and shares considerations for selecting the right technology for your team. Alchemer takes a look at effective data collection and how optimizing survey design can help researchers collect the right data. Applied Marketing Science shares how to build your customer insights capabilities from the ground up to better understand customers in 2022. Radius looks at how B2B brand teams can benefit from the deeper, more nuanced insights possible through mixed methodologies.

We hope this section will provide a glimpse into 2022 and a sample of tips and tricks to help make this year a success!

TABLE OF CONTENTS

How human-augmented AI will transform UX research:

Leveraging insights as a service to generate deep customer insights, fast. p. 13
INSIGHTS AS A SERVICE | WEVO

What is the newness effect – and why is it important?: How to inspire excitement with consumers, enhance your brand image and create greater product success. p. 16
BEHAVIORAL RESEARCH | InsightsNow

Fading brand awareness in COVID-19 America: Is it the pandemic or marketing blunders?. p. 18
ADVERTISING RESEARCH | Decision Analyst

Busting sustainability myths with Colgate-Palmolive: How to win big at the shelf with sustainable products. p. 20
IN-CONTEXT RESEARCH | EyeSee

The demands of DIY: Considerations for selecting the right technology for your team p. 22
DIY RESEARCH | InnovateMR

Effective data collection starts with the right questions: Optimize survey design to collect accurate data p. 24
DATA COLLECTION | Alchemer

The key to better understanding customers in 2022: Building your customer insights capabilities from the ground up p. 26
EDUCATION/TRAINING | Applied Marketing Science

The future is mixed methodologies: B2B brand teams need deeper, more nuanced insights p. 28
BUSINESS-TO-BUSINESS | Radius



INSIGHTS AS A SERVICE



How human-augmented AI will transform UX research

Leveraging insights as a service to generate deep customer insights, fast



BY NITZAN SHAER

Co-Founder and CEO, WEVO

“Artificial intelligence” is a phrase that can take our minds in many different directions.

Not everyone is excited about the role of AI. In fact, 72% of Americans are worried about a future in which robots and computers can complete traditionally human jobs, according to data from Pew Research Center. Most of us have seen movies like *iRobot*, and we don't want to suffer a similar fate.

We need to reframe our thinking toward artificial intelligence and how it can help ignite a positive change in the UX research community. Instead of “humans vs. AI,” we need to adopt a “humans, with the help of AI” mind-set. In a

study involving 1,500 companies, Harvard Business Review found that companies that have humans and machines working together achieve the most significant performance improvements.

Synergy, not separation, is the key to success.

UX research is inarguably valuable. It's also costly and time-consuming for research professionals. In our current state, there are two challenges to meet a surging demand for insights:

1. Access to the right tools for pro-level UX researchers.
2. Insufficient supply of UX researchers available for hire.

Human-augmented AI allows user researchers to generate and analyze tests effortlessly with insights as a service (IaaS) solutions that take minutes to start, run and review.

Combining the brilliance of human UX researchers with the power of AI will spur rapid, accurate insights at scale. This research will be measurable, benchmarked and easily accessible for all parts of your organization.

Demand for insights is increasing, and fast

We're experiencing an exponential growth in demand for insights. Organizations are feeling the pressure. In order for businesses to accommodate their needs and the needs of their consumers, we'll collectively need 100

million research professionals by 2050, according to research from the Nielsen Norman Group. Talented researchers don't grow on trees, so meeting this number may prove difficult. But what's fueling this explosion of demand for UX research in 2021 and beyond?

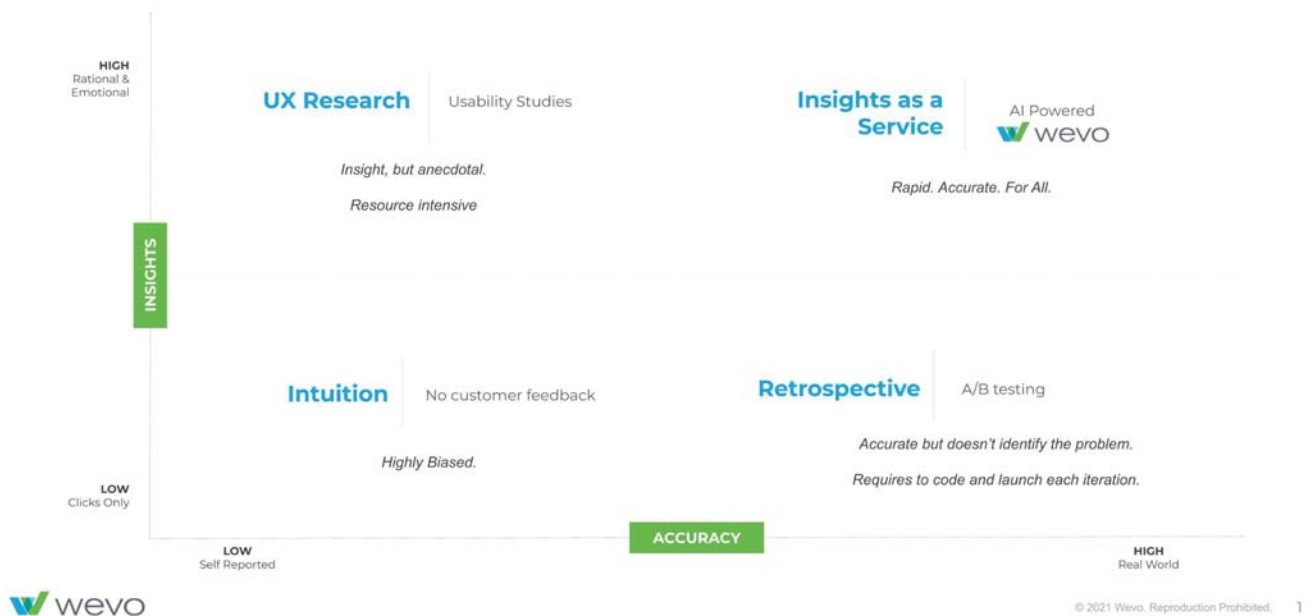
Brian Cahak, managing director of digital growth and marketing operations at Accenture Interactive, has a theory. “2021 is the Era of Agility, where the winning businesses will be the ones that identify and respond to consumer needs more quickly than their peer set,” Cahak says.

Most organizations are undergoing a digital transformation, whether it's intentional or spurred on by the effects of the COVID-19 pandemic. Consumer expectations changed during the pandemic, with an increased desire for flexibility. Roughly 90% of consumers demand more authentic and purposeful experiences with companies, per Accenture. To respond to this shifting market, 74% of companies are trying to be more agile and resilient.

To both be agile and deliver these personalized experiences, brands need to understand their consumers' emotions and preferences at scale. This means organizations need scalable and reliable tools at their disposal.

The current state of UX research

Researchers have the power to address problems and deliver insights for the entire organization. Organizations need to do everything in their power to fully



unlock the potential of their savvy researchers. Only when you combine researcher expertise with new IaaS solutions can you truly be a next-gen research organization.

You might have a small team leading A/B testing and user research. Quantitative and qualitative research might be gathered separately, generated from “rearview mirror data” (like actual usage or behavior) or large-scale quantitative surveys. Commonly, UX research is siloed and researchers aren’t empowered to connect and share their insights with the entire organization.

Many companies are building toward a next-gen research approach but there’s another level to unlock that represents the future of insight-led organizations. It’s possible for a vision of UX to permeate the organization, which empowers broad teams to solve more complex problems.

What’s missing in the current state?

Current research methods aren’t fully meeting the demand for quality, high-volume user feedback. We’re often stuck with pure-play qualitative research that

isn’t at volume and pure-play quantitative research that doesn’t clearly address the “why” of the user experience.

Perhaps most importantly, many organizations lack a means of measuring and benchmarking their research against their own results, as well as the competitor landscape. As the great management consultant Peter Drucker once said: “If you can’t measure it, you can’t improve it.”

Artificial intelligence speeds up UX research

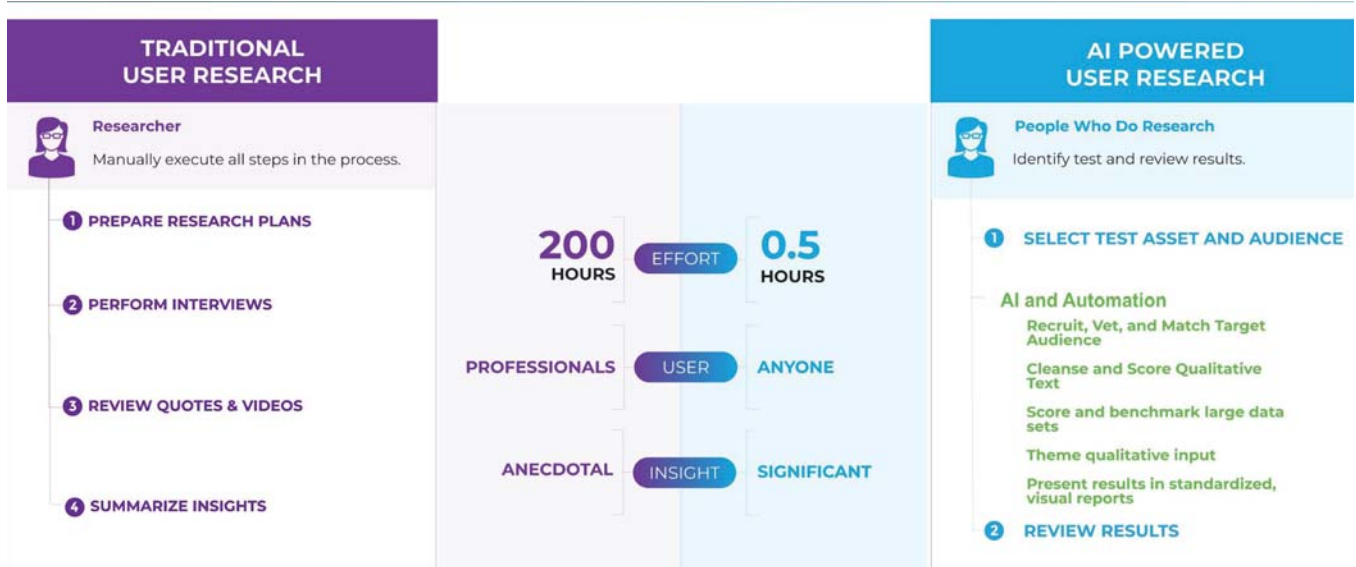
Artificial intelligence will never replace human researchers. There’s always going to be a massive need for expert analysis and a researcher-led effort to communicate results into actionable insights for the rest of the organization. As Harvard Business Review found, next-gen organizations will strike the right synergy between humans and machine learning. AI becomes a tool that enables researchers to shine.

Traditional user research requires researchers to manually execute all steps in the process: preparing research plans, recruiting panels, moderating in-

terviews, reviewing hours of video and hundreds of pages of quotes, and manually categorizing the data into useful insights. That could mean months of a researcher’s time tied to a survey of a half-dozen participants.

AI, meanwhile, streamlines certain parts of the research process to produce more rapid research. Artificial intelligence through an IaaS platform can play an integral role in provisioning the panel, scoring users’ experience and pointing researchers towards reliable trends and signals within the research. Researchers can thus spend more time identifying the test, reviewing the results and sharing their findings with their organization, without silos.

It’s also important to note that “artificial intelligence” isn’t a catch-all term. It’s not enough to just leverage any AI; you have to find AI that encompasses a standardized methodology, simple intake and consistent data storytelling. These attributes help your colleagues understand and analyze high-volume user feedback more rapidly and effortlessly.



Insights as a service: Humans, AI and the future

Organizations can turn to an IaaS platform to power their human-augmented AI operations. The combination of smart humans and AI form the foundation of next-gen research. Brands can gain a singular lens to view their brand's tonality and content, as well as their consumers' emotions and expectations.

Phillip Quintero, director of design strategy and research at Bright Health, is one insights leader who has leveraged human-augmented AI solutions to achieve outstanding customer research results. "Human-augmented AI blends some of the strengths of other tools into something unique," Quintero says. "Your data comes back structured, easy-to-understand, sharable and it has both the high sample size you get from surveys and the rich qualitative feedback you get from usability tests."

All the while, researchers save time for their most valuable activities, with AI helping to score and benchmark large-scale qualitative insights. IaaS solutions can benchmark data against all data points, not just those that exist within the organization. Standardized tests and measurements allow user tests to be compared against other tested

experience in your industry.

AI will change the speed and volume of user research. Machines can help researchers achieve results faster and more accurately, at a scale that has previously not been achievable. That leaves researchers to focus on testing and analyzing high volumes of qualitative data, making it possible to feel confident about understanding the "why" in the user insights at scale.

Instead of relying on six to eight users to help us understand how customers think, human-augmented AI as part of an IaaS platform gives researchers qualitative insight from hundreds of users. Organizations can move from more functional and anecdotal findings to emotion-driven findings at scale.

The value of next-gen research in your organization

What does the future of your organization look like once you've been able to integrate smart humans and artificial intelligence into your UX research foundation?

Next-gen research organizations are powered by a hunger for improved UX that's threaded through the entire organization. Robust tools for testing and validation research, including a

human-augmented AI-powered IaaS engine, form a standardized tool stack. Qualitative and quantitative insights are required for every UX action. Silos are no more, with teams across the organization leveraging select research techniques. UX researchers can focus their valuable time and energy on solving more complex problems.

So, artificial intelligence isn't so scary after all, is it? Truthfully, organizations that don't look for transformative tools to supplement their researchers actually face a scarier reality than those that ignore emerging technologies.

Achieving accurate, rapid UX research results that are scored and benchmarked is within every organization's reach. Human-augmented AI is a research strategy that can unlock the potential of researchers and lead organizations into the next generation of UX research.

WEVO is a next-gen user experience platform that enables teams to effortlessly uncover customer insights. Leveraging high-volume user feedback and AI, WEVO delivers meaningful insights, enabling user research, product and marketing teams to create the right customer experiences, faster. Optimize every experience at wevoconversion.com.



What is the newness effect – and why is it important?

How to inspire excitement with consumers, enhance your brand image and create greater product success

BY DAVE LUNDAHL

CEO and Founder, InsightsNow



In today's world, consumers are seeking "newness" all the time, looking for something on which to take action (especially after a long period of limited action). In a saturated market, new products create excitement among target consumer groups. Consumers have so many choices it is important for consumer product companies to know how to cut through the clutter with a new or updated product.

Newness is also essential for the brand itself and the perception of the brand. Brands that are perceived as innovative and trendsetting are the most disruptive in the marketplace and are gaining the most market share.

This focus on "newness" is twofold:

1. Newness answers the need for new products that create excitement in consumer choice.
2. Newness can be used to create positive brand perception and trust.

So how do you gain the insights needed to make sure your product and brand have this edge? You enhance your marketing and consumer research techniques to include true behavioral metrics that give deep understanding of real consumer behavior and what you can do to disrupt current behaviors.

We must go deeper to understand what drives disruption. To understand newness in relation to products in the marketplace, researchers must look at the brand, brand promise, product innovation and product delivery through the lens of human behavior. Are all of these aspects working together to deliver the reward and emotional impact that consumers are looking for?

The newness effect

What we call "the newness effect" is an advancement in behavioral market research that connects the dots between implicit emotional impact and behavioral disruption of consumers. This is used when an existing product is updated or changed or a brand-new product is introduced that would

cause a target consumer to choose the changed or new product over one they had routinely chosen in the past.

Category lift predictions

The ability to predict how a new product will disrupt behavior of individual consumers, disrupt a product category and reinforce brand image is a powerful decision tool. The newness effect focuses on a set of metrics that can be used to gauge and predict category lift – a measure of how a new product disrupts a whole product category and a way to evaluate brand impact. We use implicit techniques to produce these metrics. By identifying the product design or concept that can generate the greatest emotional impact and perceived benefit with consumers, brands are able to drive choice over category competitors.

Using implicit testing

The newness effect leads to new insights by using behavioral measures of trust, relevance, uniqueness and emotional (TRUE) impact. Measurement is done through InsightsNow's Implicit/Explicit Test™. The Implicit/Explicit Test is a patent-pending approach to assess whether each person's reaction is implicit or explicit – and in which direction. It is unique in that it provides a calibrated classification for each person each time they complete the test, and it is especially useful to newness as it shows

when consumer disruption occurs. This approach lets you see the exact percentage of people who are reacting in a certain manner, illuminating a quantifiable route to move forward in the best way possible with products, projects and plans.

Trust, relevance, uniqueness and emotional (TRUE) impact

- **Trust:** Brand trust and brand perception are important aspects to understand when creating a new product or planning existing product innovation for disruption. Using the Implicit/Explicit Test, brands measure positive and negative responses to trust questions that dig into the subconscious of their customers to determine whether product updates or new products will support the brand.
- **Relevance:** Are your products and product claims relevant? Once again, researchers apply the Implicit/Explicit Test to get metrics for relevance by employing testing to look at every single claim across the whole category for their product. For example, when consumers quickly answer “yes,” the implicit score indicates a high level of implicit relevance of the product or claim presented, and this high level is more likely to nudge an existing habit. Conversely a high percentage of people with slower responses indicates more disruption, which is important to newness if your goal is to get people to stop and reconsider their choices.
- **Uniqueness:** Are your products or claims unique to the product cat-



egory? Once again, by gathering data from across the category and testing consumers’ responses, you arrive at a metric that allows you to create a product or a claim that will stand out in the category, and you make sure it supports your brand.

- **Emotional:** At InsightsNow, we use a four-step process to measure implicit emotional reactions. First, respondents project their emotions to a contextual image that captures their feelings about the product. They explain why the image is a good metaphor, then describe the image in their own words. (Image metaphors provide a highly repeatable way to report feelings.) Finally, the Implicit/Explicit Test connects emotions to the image, resulting in an implicit emotions score used to identify if you are delivering a spike in positive disruptive emotions.

The newness effect uses all the metrics gathered from these four key categories along with an incremental set of category choice activities to understand the potential for category lift – the amount of category share your new product can take by disrupting consumer behavior.

Implementing for success

Because the newness effect provides measurement of human behavior, you can use the data to create new, disruptive products appealing directly to subconscious emotions and driving choice. The approach includes discovering opportunities within the product category for disruption and exploring what claims will resonate as new and trendsetting – the category lift. The newness effect also looks at the behavioral impact of product experience on the perception of the brand and the behavioral impact of marketing messaging and advertisement to impact awareness and to drive trial.

More than ever before, consumers are searching for the next best thing. The limited “action” during the pandemic, coupled with a drive to eliminate boredom, has resulted in consumers seeking out products and brands that are staying on the cutting edge. Brands that leverage newness well are the ones that will see disruption and success. To learn more about applying the newness effect to your next innovation, visit:

www.insightsnow.com/newnesseffect.
info@insightsnow.com
www.insightsnow.com



Fading brand awareness in COVID-19 America

Is it the pandemic or marketing blunders?

BY JERRY W. THOMAS

President and CEO, Decision Analyst



A number of our major clients continue to see downtrends in brand awareness and advertising awareness. COVID-19 and changes in consumer behavior related to the pandemic are the major causal factors but that's not the whole story.

Retail behavior

Traditional brick-and-mortar retailers, after experiencing huge declines in foot traffic during COVID-19 peaks, are beginning to see foot traffic (number of store visits) come back. However, the number of store visits overall still trails the pre-COVID-19 time period in many

retail categories.

When walking down retailers' aisles, consumers see an array of products, packages and brands. Visits to retail stores help maintain and reinforce brand awareness across a wide array of brands, even if the brand's labels are not purchased. We don't normally think of visiting retail stores as exposure to advertising but those packages on the shelves are little billboards advertising the different brands. Walking down the store aisle is analogous to driving down a superhighway and viewing billboards along the roadway. So, as store visits trend upwards, brands should experience some lift in brand awareness, all other factors remaining equal.

Some might argue that shopping online makes up for the lower level of retail store visits. It does to some degree but online search functions allow you to see only what you want to see (and that means exposure to fewer brands). Also, if the online purchases are repetitive (say, for groceries), you might use past purchases as a guide to the next cycle of purchases – again, limiting the number of different brands you will see.

Travel behavior

COVID-19-related reductions in commuting and other driving times have reduced consumers' exposure to outdoor billboards and signage and reduced exposure to roadside retail establishments. It's obvious that brand awareness created by outdoor advertising

would be negatively affected by reduced auto commuting and other driving. What might be less obvious is the downward pressure on retail store awareness. Retail sites along major highways are chosen partly for their advertising value. Highly visible retail sites tend to build and maintain awareness, while lower levels of traffic reduce the advertising effect of these retail sites. So, reduced travel reduces awareness of restaurant brands, gasoline brands, food stores and most other retailers. Auto traffic is coming back but many consumers still work from home, at least some days, so reduced auto traffic continues to exert some downward pressure on brand awareness.

Media behavior

More time at home during the pandemic is leading to more time in front of the television and online. TV viewership is higher than it was before the coronavirus arrived, at least among the office workers who can work effectively from home. The third to one-half of the population who work in the social-interaction portion of the economy (entertainment, travel, churches, restaurants, hospitals, etc.) or in construction or factories are likely consuming media as they were before COVID-19. Online activity (not work-related) is likewise up since the start of the pandemic. So, it's likely that TV advertising and digital advertising are as effective – or perhaps more effective – as a result of millions of people working from home. (The one

counterpoint is the rapid growth of pre-recorded shows and streaming of shows and movies, where TV commercials do not appear.)

However, a massive shift of advertising dollars from traditional media (especially TV) into the digital arena (social media and online advertising) over the past decade is a major issue. Television is still the highest-impact media for most product/service categories; social media and other digital advertising tend to achieve high frequency but low reach. The shift of media dollars to digital advertising is a major cause of declining brand awareness in many product categories.

Stress

Isolation at home, depression, career changes, job losses, deaths among family and friends, prolonged COVID-19 illnesses, bankruptcies and small-business failures, home-schooling, financial difficulties and divorces/breakups have all created massive stress in the U.S. These heightened stress levels are evident in fights over masks, disruptions on airplanes, erratic driving behaviors, etc. Heightened stress reduces one's ability to see advertising and absorb new information. While on the surface it might appear that COVID-19 is waning, the residual stress related to the pandemic is still very much alive.

Advertising effectiveness

The effectiveness of television commercials has declined over the past 20 years or so, as major corporations have reduced research budgets. Reduced ad testing has led to a decline in the effectiveness of TV commercials. Advertising that relies on vetting via the "creative judgment" of marketing and advertising executives, rather than testing among consumers, leads to less effective advertising. These executives tend to have biases and hidden agendas (don't we all have these weaknesses?) and they possess too much industry,

category and technical knowledge to be objectively representative of the target consumer. Consistent testing of commercials and ads among the target audience can identify highly effective campaigns and executions and help companies and agencies improve the effectiveness of all commercials and ads over time. So a lack of consistent ad testing is also reducing the impact of TV commercials.

Digital ads suffer from the same "creative judgment" weaknesses but even more so. The cost to produce digital ads tends to be low, compared to traditional TV commercials, so a smaller share of digital ads goes through any type of independent, objective research testing. The combination of shifting advertising dollars away from television to digital media, combined with the lower effectiveness of digital ads, is contributing to the declining awareness numbers that many brands are experiencing.

There are several good advertising testing systems available from good, reputable companies. The secret to success is choosing a system and sticking with it, so that you and your agency learn how to use and interpret the results from the system. It takes time to build up norms for your brand and your category and learn how to analyze the results from the advertising tests. To be successful, it's important to set up standards so that every new ad or commercial is tested in exactly the same way, among exactly the same type of sample, using exactly the same system. It's also important that all commercials be tested at the same level of finish. Rough executions yield different scores, compared to finished commercials. Lastly, no one question can measure ad effectiveness. The scores from different types of questions must be modeled to yield an overall advertising effectiveness measure.

Swallowing pride

Declining brand awareness attributable to the COVID-19 pandemic might fade away as vaccination rates increase and new medicines become available but there are no vaccines for bad advertising – and bad advertising doesn't seem to produce any antibodies in creative minds. The only "medicines" are consistent ad testing, swallowing one's pride to accept any negative results and learning over time how to create better advertising. Hopefully, 2022 will see COVID-19 ride off into the sunset. A return to something close to normal in economic and social behavior will provide some lift to brand awareness across many product categories but the ad effectiveness issues will persist.

jthomas@decisionanalyst.com
1-817-640-6166
www.decisionanalyst.com



Busting sustainability myths with Colgate-Palmolive

How to win big at the shelf with sustainable products

BY SANDRA PANIĆ

Key Account Insights Director, EyeSee



With many new sustainable product strategies simply missing the green mark or being labeled as greenwashing, it's become evident that the only way to do sustainability right is to think about the full picture – the product, its advertising and sustainability claims – and aim to understand who your consumers are and how they relate to this issue. But all of this can be riddled with misconceptions. So, guided with the ambition to help brands introduce more-sustainable and competitive

products – safely and reliably – EyeSee has run a comprehensive study that leveraged the latest behavioral methods, which unlock highly predictive insights by testing in context. A combination of eye-tracking and facial coding uncovered emotional engagement and visibility of posts in simulated social media timelines, paired with virtual shopping – which famously has a 0.8-0.9 correlation with real in-store shopper behavior and ensures respondents are making decisions in context.

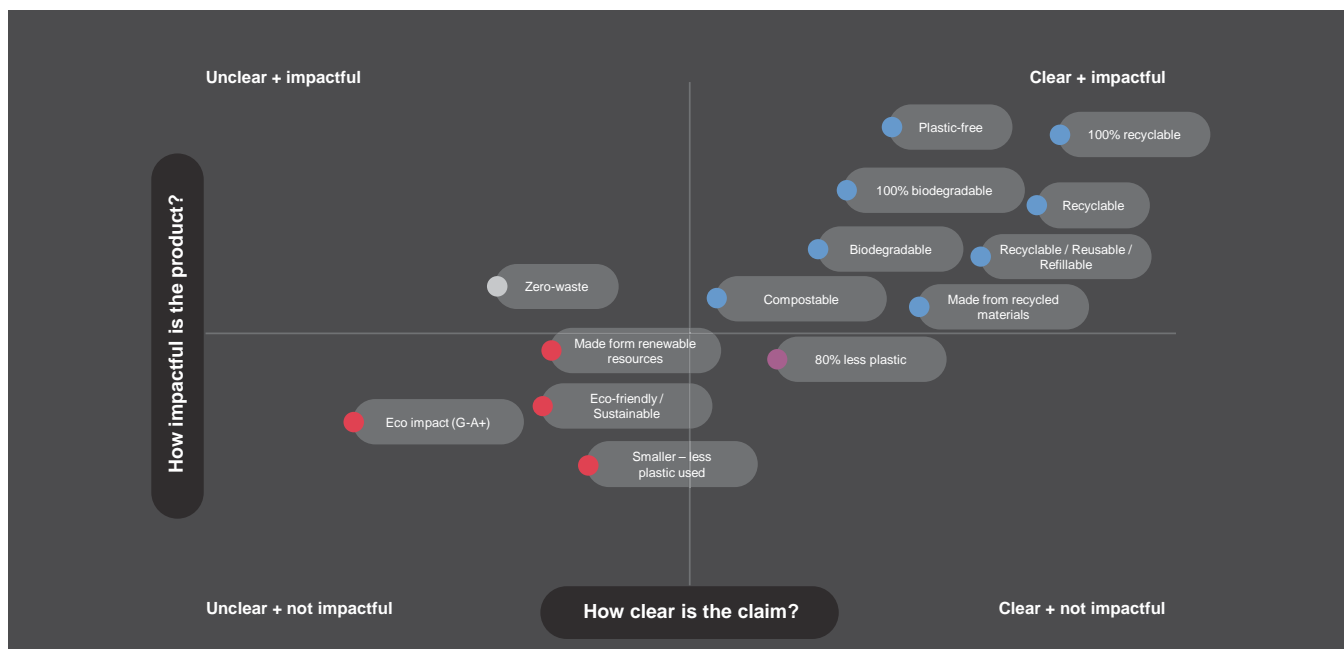
EyeSee's Insights Director in Mexico, Diego Adolfo Chávez Terrazas – named Fearless Leader in the 2021 Marketing Research and Insight Excellence Awards – tackled why relying on virtual shopping environments when conducting shopper research is the only way to go forward: “Virtual shopping is a reality check – a way to compare other findings to a behavior that is strongly grounded in reality. We ran a meta-analysis on 35,000+ respondents from dozens of projects across FMCG industries and compared survey results to virtual shopping data. In a nutshell, the results argue that it is extremely important to be careful if you are making business decisions based only on stated purchase intent – whether top-box or top two-box, as both have an error in them. We calculated the error margins and the findings indicate that the purchase intent measure is incredibly unreliable. On the brand level, the error was as high as 71% for top two-box. On the SKU level, the overestimates are even more extreme at 486% for top two-

box and 217% for top-box.”

Myth #1: Sustainable products are a niche category – very few consumers are into it

EyeSee uncovered that 86% of consumers are open to trying more eco-friendly products – implying that this is not only a not niche category but also an opportunity-packed one. This group consists of two segments: The true eco buyers who are motivated to make a difference and change their behavior and the “talk is cheap” segment who state they care about sustainable products but need incentives to change their behavior. The remaining 14% are truly not interested in the cause and have no intentions to change their behavior.

From the perspective of Colgate-Palmolive's leading expert on sustainability, Cherie Leonard, two big consumer trends have emerged. The first one is the urgency to take action. “We see this not only because people are seeing the good, such as cleaner air and fresher skies – especially through the early days of lockdown, but also because they're seeing the bad,” says Leonard. “Suddenly, it became very apparent to consumers how much trash they produce as an individual and as a household.” The second trend is the uncertainty of where to start acting more sustainably – and this is where manufacturers have an enormous opportunity to help and encourage their consumers to act greener!



Myth #2: Claiming your product is sustainable makes a real difference

Product claims are the best real estate to describe your green impact quickly and clearly. Therefore, the study incorporated a claim test to understand how consumers perceive some of the most commonly used claims based on clarity and impact on shopping behavior, such as “eco-friendly,” “zero waste,” “sustainable,” etc. In reality, while most claims were similarly compelling, others stood out as a smarter choice for brands.

For instance, the three claims just mentioned are some of the worst-performing out of those tested! These findings indicate that consumers are unsure of how these types of products contribute to a cleaner environment – and as such, they have little to no impact on shopper behavior. One of the brilliant ways Colgate-Palmolive saw packaging as an opportunity to educate their consumers, as Leonard explained, is by putting a QR code next to a clear and straightforward claim to encourage people to learn more about the product, the pack and the process – and ultimately build trust with them.

Myth #3: Buying sustainable means “sacrificing” consumer experience for the greater good

One of the biggest misconceptions about sustainability is that it means lowering the standard of living or making consumers give up the things they love and enjoy. What we have uncovered is that 41% of consumers are ready to buy more-sustainable products – but only if they are better-quality. This huge portion of shoppers that are ready to make greener purchases is opening doors to brands to not only produce more-sustainable products but to do so in a way that actually improves the consumer experience. And this is not a new trend – as with every NPD and new product launch, brands are always striving to better the shopper experience and outdo the competition – so, why treat sustainable products any different?

Myth #4: Guilt-tripping works wonders for attention

Most social media campaigns that tackle environmental issues communicate in a way that scares and makes consumers feel concerned about the future – but this approach has little im-

act on consumer purchase. This is why we zeroed in on how social media posts that focused on pollution impacted purchases for more-sustainable options in a virtual shopping environment. Posts that are scientific in nature and offer some knowledge to consumers while making them feel good about their choices are the definite winners.

In Colgate-Palmolive’s case, social media is a tool that amplifies the conversation on sustainability and drives energy and excitement for what they are doing as a brand. It is also an opportunity for their brand enthusiasts to share their knowledge and message about sustainability.

For more insights, check out the full report at bit.ly/3x4j0ro or reach out to info@eyesee-research.com!

info@eyesee-research.com
1-917-960-6255
[eyesee-research.com](https://www.eyesee-research.com)



The demands of DIY

Considerations for selecting the right technology for your team

BY JAKE LEAL

Senior Director, Vision Suite™, InnovateMR



Ever since I joined the market research space over six years ago, I've been in positions in which I've leveraged increasingly sophisticated tools and technology to support clients with conducting research that drives business results faster. As time has passed, we've seen a significant acceleration in the role that technology plays in streamlining research. While there has been a lot of shared benefit, there are also shortcomings and big considerations that remain.

DIY platforms have their advantages but they can also pose challenges if they aren't properly aligned with

your organization's unique needs and goals. With about 50% of projects being handled internally by clients and with that percentage only expected to grow, DIY platforms are becoming even more of a necessity in order to keep up. On the surface, it seems that DIY platforms would be the perfect fit for this change in workload allocation but it's important to take a step back and fully consider what full technology adoption entails. In addition to these trends of increasing internal workloads and the proliferation of technology, it's critical to acknowledge the trend of the democratization of insights. This ease-of-access to technology enables more businesses than ever to capture insights and apply them in their strategies. Insights professionals should not be wary of this change but should take an active role in shaping these new methods and help to influence a new wave of platforms that can improve productivity, quality and time to insights.

With these themes as our backdrop, there are a few considerations to help inform and empower researchers to make decisions that will help simplify their day-to-day workload, as well as improve the speed and quality of their insights. As a DIY expert, here are the top things I've learned from speaking with clients that can be useful when considering a DIY solution:

Consider the time required in technology adoption. We need to be honest

with ourselves and acknowledge that platforms not only require time and specialized attention, but also demand a level of learning and hands-on application to feel comfortable using the technology. Always expect a learning curve before you or your team are proficient in a new platform, no matter how intuitive it may seem.

Assess the capabilities of a research platform. It's important to understand what capabilities are being offered to better plan your holistic strategy as it relates to your research goals. Surprisingly most companies aren't just using one platform. Today, organizations are often leveraging five or more tools to conduct their research, and according to the most recent ESOMAR buyer study, this figure topped out at 5.4 tools per company in the U.S. Are you okay with adopting individual systems – potentially one tool for building surveys, one tool for procuring research respondents and another for reporting and data visualization? On the surface, that doesn't sound efficient, but the data shows this is often the case. It's important to understand how managing disparate systems can impact your time and resources upfront as you learn the ins and outs of each tool.

Think about platform connectivity. Even after the initial learning phase, you will frequently need to connect or pass information between the platforms

you use, so being realistic about the reoccurring demands will be important to your team and research. On the positive side, as technology is advancing, there is an increase in platforms that look to integrate one or more tools into a single solution. The development of integrated products can increase your productivity but it is worth considering whether an integrated platform will provide you the quality of output that you could get from separate but specialized systems. As an example, some tools offer sample, but they don't own or manage the panel, so domain expertise is limited and problems can be slow to be resolved.

Understand the impact of your research. Some all-in-one tools lack the quality and sophistication of a dedicated tool but the trade-off for convenience can more than make up for it. There will always be trade-offs and considerations to be made when determining what's right for your team and your research. The key is understanding your bandwidth, knowing what you want from a platform and going into the process informed so you can make the best decision possible.

Consider the availability of a support team. Outside of technology considerations, there is another very important aspect of research platforms that is often taken for granted but quickly becomes important: support. When choosing research platforms, you will want to consider whether you want a solution that is fully DIY or something with a level of dedicated support, which our team likes to call DIT (do-it-together). Most platforms will lean toward DIY and offer customer support if questions or technical difficulties arise but only a few will offer more than that. This is noteworthy when unexpected problems occur. If you are a team or organization who wants independence and can man-

age the tools along with your day-to-day workload, then true DIY platforms are a convenient way for you to execute your research in a quick and cost-effective manner. However, consider the advantages of dedicated support, especially with teams being tasked to do more than ever.

Consider a blended option if bandwidth is a challenge. If you find yourself constrained for both time and attention, or if you don't feel comfortable with managing all aspects of the technology, then DIT may be the more appropriate route. Often, there is 24/7 support and specific team members dedicated to your account who act in more of a partnership role than tech support role. With DIT, you can get hands-on support and a consistent contact that will learn how you approach your research and be there to provide advice when needed. It's common to find researchers who lead with a DIY approach but soon become frustrated when their own workload increases or the support doesn't keep pace with their needs. Being mindful of your own bandwidth at the start can set you up for success with whichever form of support you decide to choose.

Choose the right partner. The right partner will be empathetic, understand your research goals and consider your day-to-day workload. As we pursue better and smarter technology, sometimes we find that we take away too much of the human aspect when it comes to relationships and support. When choosing a research platform, don't look at it solely as a tool, but instead as a partner or an extension of your team. Ask yourself: Are you content with a partner who only communicates via e-mail and provides technical support or do you value more of a one-to-one relationship where in addition to a platform, you are also getting phone and/or video

support? Are you okay speaking to someone different every time you have a question or do you value a consistent contact and relationship? Finally, are you willing to go it alone or do you want a partner to understand the research you are conducting and provide a consistent resource for the times you need help? There's no right answer or one-size-fits-all solution, because we all have different needs and preferences. The only certainty is that, as you decide on a platform, it's essential to know what you really want or need. Don't make the choice solely on technology but also consider the human aspect.

In light of these trends, the team and I at InnovateMR have developed the Vision Suite™ which strives to blend the best aspects of technology and personalized support into one solution. Our platform was designed to avoid disparate systems and provide an integrated suite that offers survey design, sample procurement, data quality controls and dynamic reporting, all in one platform. Our integrated platform is unique in that we are experts in both panel recruitment and data quality, so our solution is designed with a research-first mind-set as opposed to a focus on technology with a lack of expertise. Finally, we cultivate and promote a DIT environment, where we offer consistent points of contact through call, video and e-mail support, as well as hands-on support – whether it's addressing questions or helping implement aspects of your research. There's no one-size-fits-all solution but the Vision Suite™ is our embodiment of what we think DIY can and should be. Reach out to us at info@innovatemr.com to learn more and see if the Vision Suite™ is the right solution for your research team.

info@innovatemr.com
bit.ly/3p0YBhV



Effective data collection starts with the right questions

Optimize survey design to collect accurate data

BY CHRIS BENHAM

CMO, Alchemer

Researchers often jump directly into the “build” phase of the survey but once you’re writing questions you’re nearly halfway done with your project. Survey questions are like the walls, floors, doors and windows of a house: They’re vital, but if you put them up without laying a foundation you’re in for some serious trouble. Time to create a great data collection survey.

Constructing survey questions

Survey design involves thinking about the psychology, emotions and words behind the questions. The design process is the strategic phase. It should include your survey goals and learning objectives.

Building the survey, on the other hand, is the tactical phase. It considers logistical issues like security, logic, survey fatigue, bias and data collection. When building surveys you think about the details, including question types, survey length, anonymity and data analysis.

Turning goals into real data collection survey questions

Most survey-building teams consist of one to three people; however, they should always consider stakeholder input during the process. Data collection survey design – particularly the identification of goals and objectives – can be a group effort but having too many workers on a construction site can create more problems than it solves.

Ideally your survey construction team will be made up of the people who will be responsible for presenting the data that has been collected, because

they need to understand the source to present outcomes more clearly. Other good team members may be those who are going to act on the data. They’ll often have different insights into question phrasing and order.

Qualitative vs. quantitative data collection

One of the biggest questions about questions is whether to use qualitative or quantitative question types. The answer depends on what you want to achieve. Qualitative questions are open-ended. They usually include a “why” somewhere and they can be very useful in helping to define a problem. Quantitative questions are designed to simply gather data, not ask opinions.

Both are highly useful but you should choose between them carefully because they offer very different kinds of data collection and outcomes.

Qualitative questions help define a problem. They ask “why?”

If you are exploring a hypothesis, a qualitative survey can identify a problem and its nuances before conducting a quantitative survey. Qualitative questions are open-ended, which means text analysis is required to interpret results (and these are particularly susceptible to interpretation bias).

Qualitative questions are always open-text questions but they come in many forms, including:

- Text box: Responses can be one word to one sentence long.
- Essay box: Several sentences to several hundred words, depending on the limit you set (or don’t set).

When asking a qualitative question,



consider using an autocomplete feature to minimize data cleanup. This lets you suggest common answers so that you get consistent responses but it can also introduce bias, so proceed with caution. It’s worth trying, however, because having the same answer format will make it much easier to analyze the data. For example, these answer options all mean the same thing to a human respondent:

- twenty-five
- 25
- Twenty-Five

But each format (including uppercase versus lowercase) will be treated as a different answer option during open text analysis. To get the full impact, long-form questions really need to be read individually.

Quantitative questions, on the other hand, ask “what,” “when” or “how.” These questions typically quantify a predefined problem so you can understand how prevalent it is. Quantitative questions have limited answer options, which makes it easier to measure the results.

These are the most-used quantitative survey questions, and your respondents will quickly recognize the type. There are less common, more advanced varieties of quantitative questions as well, but keeping data relatively simple

will create a better experience for those answering your survey. Common data collection question types include:

- Radio button: Use these when you want a single-answer option.
- Checkbox: Use these when multiple answer options are acceptable.
- Drop-down: These are most used as single-select but can also be used as multi-select answer options.
- Likert scale: These are most used for measuring emotions such as satisfaction or agreement. Odd-numbered scales allow for a neutral response.

Avoiding survey fatigue

Online data collection surveys shouldn't be exhausting. Tired respondents will either abandon your survey or give you substandard data. When you're building your survey, you need to take the respondent's experience into consideration.

Having a long list of items to rank generally increases fatigue and dramatically increases drop-offs. Many surveys fail to collect useful data simply because they were not designed to keep their respondents interested. As a survey builder, it is your job to reduce survey fatigue whenever possible while still gathering solid data that your team can act on.

General question guidelines

You also need to make sure that people taking your survey don't get thrown by awkward answer options or question construction. A common error is creating overlapping answer options. Selecting one choice should completely exclude all the others. When answers intersect it can cause a lot of confusion. For example:

Correct format:

How long have you been a member?

- 1-10 years
- 11-20 years
- 21-30 years
- 31+ years

Incorrect format:

How long have you been a member?

- 1-10 years
- 10-20 years
- 20-30 years
- 30+ years

You'll also want to refrain from using double-barreled questions, which combine multiple questions into one. This adds con-

fusion and skews your data. For example:

Don't ask:

How satisfied are you with our buffet food and drink options?

Instead, ask:

How satisfied are you with our buffet food options?

Address drink options in a separate question. If you're not sure that you've included all the possible responses in your answer choices, include an "other" option for those who don't find the right choice in your list. A forced answer that doesn't apply will taint your results.

The importance of survey validation

Validation is the process of checking your survey to ensure it meets your specifications and fulfills its intended purpose. Like editing a document, validation requires a detailed review of answer options, logic, reporting values and reporting data to verify that you are set up to collect quality data.

How to validate your survey

Validation is a key component of great survey design but it's often overlooked as people skip straight to testing. Testing can uncover some problems with a survey but validation is a more rigorous review process.

A common problem occurs when different data formats are treated as different answer options. This will make it hard to analyze the data unless we do some data cleaning to standardize the answer format. Changing the question type, adding instructional text on the proper format you would like entered, using autocomplete or using a data validation feature will go a long way in solving this common problem.

Testing your survey

Testing your survey simply involves taking your survey on the different devices that your respondents will be using to ensure it displays and flows correctly. Advanced survey tools provide a testing feature that quickly generates test data so that you can also look at the results to see if it reports as you expected. Run a few reports on the data, then ask yourself these key data collection questions:

- Are your questions reporting the way you expect?
- Are you able to create the reports you need using the data you're collecting?
- Is the data in the format you need?

The power of survey logic

One of the coolest parts of building a survey is adding logic. Put simply, logic is a set of conditions that you can apply to a question, answer or even an entire page of your survey that affects how it performs. Survey logic is extremely powerful and its benefits come in two flavors:

Fatigue fighting: Keep respondents engaged by only showing them questions that are relevant to them.

- Page-jumping: Skip entire pages that aren't relevant to a respondent.
- Show-when logic: Only show questions when conditions are met.
- Percent branching: Randomly assign a set percentage of your respondents to a branch of your survey.
- Piping: Inserting data collected early in the survey into a later question.

Bias fighting: Avoid any bias that might come from your question or content order.

- Randomization: Randomize question and/or answer options.
- Disqualification: Prevent those who don't qualify from answering your survey to collect cleaner data.
- Survey timing: Identify and disqualify survey responses that were answered too quickly.
- Vote protection: Prevent respondents from taking your survey more than once.

Survey logic is one of the best ways to keep your survey relevant and collect quality data.

A well-built survey drives successful data collection

Approaching your survey build with care and attention will make sure that it serves your ultimate purpose. By creating an appealing design and an experience that's as personalized as possible, you'll get more engaged respondents who give you better data. Keep these best practices in mind and you'll be well on your way to effective data collection.

www.alchemer.com



The key to better understanding customers in 2022

Building your customer insights capabilities from the ground up

BY KRISTYN CORRIGAN

Principal and Practice Lead, Applied Marketing Science

Do you talk to customers often but learn nothing new? Do you struggle to fill your product pipeline with good ideas or kill bad ones? Are competitors out-innovating you? Perhaps you need to refocus your team on solving the right customer problems.

To stay competitive in today's constantly changing environment, product managers, R&D scientists, engineers, market researchers and customer experience managers alike need a strong customer insights strategy. This means learning to put the customer at the center of your innovation process through an exploration of their needs. By identifying and prioritizing customer needs through systematic voice-of-customer (VOC) research, you can be sure you are investing in products that satisfy customers' unmet needs.

What is the voice of the customer?

If you ask customers what they need in a new product, you will hear generalities – “faster,” “cheaper,” “better” – or features your competitors already offer. But that's not actionable insight and these answers don't lead to successful innovation. Successful products and services begin with a complete and detailed understanding of customer needs. Attaining actionable insights – new information that drives design

decisions – requires a voice of the customer methodology. Whether you are working on incremental enhancements to your customer experience design, designing a breakthrough new product or creating a disruptive business model, our voice of the customer process can help you find insights nobody else has, reducing your risk of failure and saving you time and money.

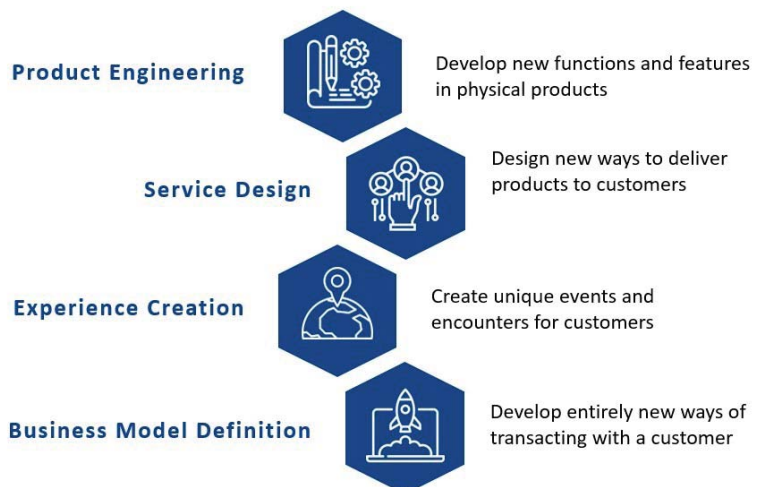
Real insight comes from examining customer experiences and understanding customers to develop a keen sense of empathy. What are customers trying

to do? How do they solve those problems today? What are their frustrations or pain points? What is their experience working with your company or with your competitors?

Obstacles teams face when understanding customers and their needs

- **Misdefining VOC:** Many organizations use the term “voice of the customer” to describe any customer insights-gathering. Real voice of the customer research is

VOC DRIVES INNOVATION AT EVERY LEVEL OF THE BUSINESS



not merely customer satisfaction or NPS surveys. It's not customer-demanded features, opinions of industry experts, anecdotes from sales or tech support, following the competition or conversations with a small set of only your customers. Real VOC work is a systematic understanding of the complete set of customer wants and needs, prioritized by the customer.

- **Focus:** Many teams tend to focus on finding a solution before identifying the problem. Understanding customers' needs or the benefits they seek from your product, service or experience allows you to innovate the right solution. When teams know how to focus their efforts on meeting the most important, unmet customer needs, they are more successful.
- **Alignment:** Depending on where you sit in the organization, there can be a gap between how companies interpret customer priorities. Cross-functional VOC teams with representation from product management, marketing, engineering and sales can create a common understanding across the organization.
- **Skill set:** Without the proper arsenal of insights techniques, it can seem impossible to drive breakthrough innovation. For your customer research to be worthwhile, you must invest in doing it right. Voice of the customer insights training ensures you can systematically understand customer needs and priorities in such depth that it creates competitive advantage.
- **Integration:** When VOC exists as part of current product development frameworks, such as Stage-Gate or agile, results become that much more actionable. Bad ideas are weeded out early and better ideas move forward with more promise.

When teams know when and how to solicit customer feedback, they are more successful.

Voice of the customer training and coaching

Hundreds of professionals in marketing, product development, research and development, and related positions face these innovation challenges. As customers' needs continue to evolve, especially through major transformational events such as COVID-19, businesses with a customer-centric mind-set will come out ahead.

Customized VOC insights training and capability-building programs give teams the skills they need to become customer-centric innovators in competitive markets. Through a collaborative effort with program managers, teams can:

- Set effective strategies
- Assess capabilities gaps
- Define success
- Build momentum with key stakeholders
- Develop job aids and repeatable processes
- Increase product development success rates

With the help of custom, instructional materials and job aids, the team at Applied Marketing Science (AMS) teaches core insights and innovation skills and makes sure that implementation is successful. Our goal is to help your team innovate and win in a competitive market.

Delivered in person or virtually, voice of the customer training teaches your team:

- Why you should listen to customers
- How voice of the customer fits into the product/service design process

- What you can do with voice of the customer data
- Who to interview
- The logistics involved in customer interviewing and observation
- Writing the interview guide
- How to interview customers to get beyond the obvious
- The principles of observational research
- How to effectively analyze interview transcripts for insights
- The benefit of building a hierarchy of customer needs
- Interpreting need importance vs. performance
- How to assess market opportunities
- Strategies for acting on and implementing VOC insights

For over three decades, AMS has brought the world's innovators closer to customers. With roots in the MIT Sloan School of Management, teaching is part of our heritage. As the originators of the voice of the customer methodology, we have conducted hundreds of engagements for leading global brands. We have trained and coached thousands of product managers, R&D scientists, engineers, market researchers and customer experience managers in the techniques we use every day.

Interested in learning more about the voice of the customer and how training and coaching can help your organization? Learn more about training and coaching at ams-insights.com/train-your-team or contact Kristyn to discuss your 2022 research goals.

kcorrigan@ams-inc.com
1-781-250-6326
ams-insights.com



BUSINESS-TO-BUSINESS



The future is mixed methodologies

B2B brand teams need deeper, more nuanced insights

BY GLENN STAADA

Senior Vice President, Radius

People's relationships with brands are highly complex and this is even more true in a business-to-business (B2B) setting. For example, manufacturing, distribution, retail and customer payment processing are connected through a complex maze of B2B relationships that exist outside the view of end consumers. Financial services organizations often sell to end customers through a diverse network of intermediaries, such as financial advisors or insurance agents. In health care, pharmaceutical companies sell medical supplies, devices and drugs to hospitals and physicians and rely on these professionals to shepherd treatments through to patients. And of course, the health insurance relationship has multiple tentacles that span various constituencies.

A B2B brand team needs to consider a wide range of influencers and decision makers when laying out marketing plans and navigating the sales process. Some have C-suite titles, while others may be IT professionals or HR executives, and others have product and service development roles within a professional organization. Regardless of title or responsibility, the perceptions, attitudes and behaviors of these professionals need to be known and used to influence product, brand, marketing and communication strategy.

The role of an insights partner with a B2B-focused organization is to

uncover the needs and opportunities, across multiple constituencies, that will strengthen the brand-customer relationships and enhance their portfolio with innovative and relevant offerings. An insights framework must clearly and deeply identify the importance and frequency of the decision maker needs. Do the current needs of executives have passing or long-term importance? Are these needs a one-time event or ongoing? Having a thorough understanding of shifting buyer attitudes and behaviors will make clear the necessary evolution of a brand's portfolio offerings.

The complex relationship between a B2B brand and its customers, along with the ever-shifting need states of these customers, makes B2B research a highly specialized and seemingly difficult endeavor. To paraphrase a common expression, "the devil is in the nuances" when it comes to getting closer to B2B customer needs. While B2B customers have very defined and functional roles within an organization, they are still human beings who often lead – and decide – with emotions, not always pure logic or rationale. What's fast becoming a best practice in B2B research is the use of mixed methodologies to get at both the functional and emotional factors that play into decisions by these professionals. The use of multiple research phases, both quantitative and qualitative, as well as mixing qualitative methods, leads to a deeper understanding of B2B decision makers. This combined methodology approach is becoming the gold standard in creating



a B2B insights approach and offers a brand team several critical advantages, as it:

- Allows for both inductive and deductive thinking.
- Simplifies the complex mind-set of decision makers.
- Provides a more holistic view of the consumer.

Here are some guidelines in developing a mixed-methodology approach:

Research design

- Use a combination of approaches that allow you to capture insights at the macro level while also delivering on-the-ground perspective to bring these insights to life.
- Structure research phases together in a meaningful way so they build upon one another. For instance, start with qualitative to optimize new

ideas and then move to quantitative to test optimal ideas among a larger, representative sample of B2B decision makers.

- If qualitative is deemed appropriate, determine the right approach for the task and audience. Online bulletin boards can be better for a national sample of hard-to-reach executives while one-on-one in-depth interviews can lead to more candid answers.
- Build internal stakeholder interviews into the design. Use these conversations with a cross-functional selection of those that manage the business to obtain a better understanding of the constructs, issues and goals of the organization.

Sample plan

- Spend time conducting desk research (online, Dun & Bradstreet, other list sources, etc.) on your survey population to estimate the composition of the market. This will allow you to set interview quotas appropriately.
- Don't assume online panels or list sources are comprised representatively to the population of interest. Communicate the census construct of your population and ensure survey invite send-outs and incoming responses are comprised properly.
- Appreciate that sample sizes will be smaller and the margin of error will be higher. This is acceptable as universe size is much smaller than with consumer audiences.

Recruitment and screening

- Screen for only the factors that are necessary for the study.
- Understand that fraud rates are higher for B2B research, especially when using online panels. Therefore, blind the eligibility criteria within lists so that it is difficult for a fraudulent respondent to guess the answer patterns.
- Plan for an overage of interviews (10-15% above quota) which will allow for bad or fraudulent respondents to be removed.

A mixed methodology approach delivers deeper insights on all brand growth issues.

BRAND BUILDING COMMUNICATIONS RESEARCH CUSTOMER EXPERIENCE CUSTOMER JOURNEY

INNOVATION & PRODUCT DEVELOPMENT MARKET LANDSCAPE OPTIMIZATION OF OFFERINGS TARGETING STRATEGY

radius Guiding your brand on its growth journey. © 2022 Radius Global Market Research

A mixed methodology approach delivers deeper insights on all brand growth issues.

Data collection and quality

- Use red-herring questions and open-ended responses to catch fraudulent respondents.
- Create multitiered criteria for removal and check data on an ongoing basis while field period is still active. Replace removals in a way that maintains the integrity of the composition of responses.
- Use desk research and prior knowledge of markets to determine face validity of all results.

Mixed methodology in action

A major financial services company needed to refine its communication strategy. Its goal was to improve its positioning among financial advisors and become an authority on a type of fund it wasn't currently offering. The insights approach consisted of two qualitative sections – first, exploratory focus groups about funds in general, and secondly, real-time concept optimization sessions to review and revise potential positioning statements. The approach concluded with a quantitative portion consisting of an online, 24-hour poll with 150 advisors to validate performance of the fund positioning statements.

No matter what growth issue a B2B

brand team is facing – from targeting to innovation development – a mixed methodology approach delivers a deeper and more nuanced understanding to guide strategic decision-making.

Glenn Staada is senior vice president at Radius, a global insights firm headquartered in New York. He can be reached at gstaada@radius-global.com.

radius-global.com

IN FOCUS

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



// Survey Monitor



... food research

But how do you get your protein?

Plant-based meat continues rise in popularity

It's burger night in your household and you slap three delicious patties on the grill only to find they're leaking...beet juice? Plant-based meat alternatives are getting more convincing – and they're continuing to gain traction among American consumers. According to a survey conducted in August 2021 by the International Food Information Council (IFIC), about two-thirds (65%) of Americans reported eating “products that attempt to mimic the flavor and texture of animal protein but are made with only plant products” in the year leading up to the study – with 20% consuming them at least weekly and another 22% consuming them daily. Another 12% said they had not consumed plant-based meat alternatives over the past year but would like to try them in the future. A previous IFIC survey also found that 24% of adults were consuming more protein from plant sources

and 19% were eating more plant-based meat alternatives. Similarly, a January 2021 survey found that 28% had tried plant alternatives to animal meat for the first time in the past year.

Respondents indicated a variety of reasons for why they might choose to consume plant-based meat alternatives. Healthfulness led the pack, with 39% ranking it among their top three reasons, followed by these products being a source of high-quality protein (34%), liking the taste (33%), environmental/sustainability benefits (23%) and health claims/certifications (23%). Roughly half of consumers cited the nutrition facts label (52%) and the ingredients list (49%) as one of their top two ways to confirm their reasons for consuming these foods.

Of those who choose plant-based meat alternatives because of perceived product healthfulness, the top three most sought-after benefits were high

quality/complete protein (43%), heart health (41%) and protein content (40%).

When respondents were asked about their interest in certain alternative protein sources, over half (56%) were interested in vegetables, followed by grains (53%), nuts and seeds (52%) and beans and/or lentils (51%). When looking at specific sources, 42% were interested in soy and 41% in peas.

Consumers were also asked which sources of information they would consult if they wanted to know more about plant-based meat alternatives. Health websites were the most popular (with 36% of respondents ranking them among their top three choices), followed by food packages (29%), food company websites (21%), government websites (20%) and dietitians (19%). Fewer than one in 10 (9%) said they didn't want, or haven't heard, information about plant-based meat alternatives.

As contenders in the plant-based meat category multiply, so do their meat-adjacent product names and claims. To understand how these products are perceived and described by American consumers, survey respondents were shown an image of a plant-based product that resembled a burger and were told it was made without animal meat. They were then given a list of possible descriptions and asked to select their preferred options.

The most popular name was “plant-based burger,” which was among the top three choices of 39% of survey-takers, followed by “veggie burger” and “meatless burger” (35% each), “plant-based meat” (29%), “vegetarian burger” (25%) and “meat alternative” (24%). Other terms ranked much lower, such as “soy patty” (8%) as well as “meat analogue” and “soy meat analogue,” each at 5%.

When respondents were told that the burger was made primarily from soy protein, the value of transparency in the primary ingredients became



Expectations exceeded.

consumer panel
quantitative research
analysis

insights
integrated research
interactive data



Mindfield
Tech Integration and Audience Insights

mindfieldtech.com
jmace@mindfieldtech.com



••• employment research

The eye of upper management

Workers fear surveillance of communication and hours

Have you ever sent a regrettable message through your work e-mail? If so, you're not alone – and you're probably just as worried about your boss finding out as everyone else. According to an Elements Global Services article by Georgina Coleman, regrettable communications are commonplace. When describing such occasions, 44% of workers say they've talked about something inappropriate for the workplace, 35% say they were gossiping or being negative and 21% say their communications were simply off-topic from work and could be viewed as wasting time.

What's at the heart of this worry? Trust.

In a study and Google search analysis conducted by Elements Global Services, a common theme that emerges is that employees are very concerned about being monitored during their work, regardless of whether they're remote or in the office. This isn't necessarily surprising, considering that there are a myriad of ways an employer might actually surveil employees if they chose.

Of the workers surveyed, 74% of those who work remotely are concerned about their employer monitoring when and how much they work and 76% of workers who use a computer are concerned about their employer monitoring their communications. Two in three workers are even concerned about their location being disclosed by their laptop or phone. Plus, 64% have deleted their browsing history at some point and 53% have deleted a Slack or similar instant message so it can't be seen by a boss. Those working in insurance (89%), HR (85%) and accounting (83%) were most likely to say they're con-

cerned about being monitored and 59% of all workers say their employer would be upset with them if they knew everything they've ever said or written while at work.

Of the remote workers surveyed, 60% said their employer would be upset with them if they tracked when and how much they work. When asked the same question, only 31% of on-site workers reported the same. Additionally, men (58%) were more likely than women (44%) to say their work hours would be upsetting to their employer. Two-thirds of all workers surveyed (67%) admitted that software to track their productivity would likely make them more productive.

These past pandemic years have laid bare some of the core problems and tensions between employers and employees and for many office workers, the new dynamic of flexible work or working from home is still being tested and refined. For HR managers, some clues to where problems might arise lie within the thousands of queries made to Google each month.

In their Google search analysis, Elements Global Services began with a list of more than 300 common HR-related questions, then narrowed that list to the top 50 most commonly searched. This list of questions sorts into eight categories: privacy, compensation, surveillance, rest, interpersonal, benefits, scheduling and termination. According to the analysis, privacy and surveillance are the top concerns for employees, together representing 42% of the top 50 most common searches. Compensation is also a hot topic, representing 22% of the most common searches. These concerns are largely rooted in trust.

Where HR is often a critical go-between for employees and management, it's a positive sign that 83% of workers say they trust their HR manager or department. However, a few industries fall well behind the average, with about 50% of people working in media and 69% working in hospitality saying they don't trust HR. Additionally, entry-level women are the least likely to say they trust HR to protect their interests (68%), versus everyone else (79%). On the other hand, entry-level men (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. Given that personality clashes, bullying and sexual harassment are oft-cited issues, it's no surprise this fear of retaliation is a barrier.

The study was conducted by Elements Global Services and surveyed 1,000 Americans between June 11-12, 2021. Fifty-seven percent of respondents were male and 43% were female. Ages ranged from 18-68.

clear: Respondents' top-ranked descriptors became soy-specific, with "soy burger" leading the list (42% ranking it in their top three terms), followed by "soy-based burger" (39%) and "soy patty" (34%). In that context, "veggie burger" (23%), "plant-based burger" (22%) and "meatless burger" (22%) were cited far less frequently among the top three descriptors.

Respondents were also shown an image of a strip-shaped product that resembled a chicken tender. Even though they were told the product contained no animal meat, respondents heavily favored terms that included the word "chicken": 45% ranked "plant-based chicken" in their top three terms, followed by "meatless chicken" (42%), "vegan chicken" (32%), "plant-based strips" (29%) and "vegetarian chicken" (29%). Unlike when shown the "burger" image, consumers seemed to lack an alternative word to "chicken" when describing this product. Once again, when respondents were informed that the food in the image was primarily made from soy protein, their top-ranked descriptions changed to "soy strips" (43%) and "soy-based strips" (40%).

The study was conducted by the International Food Information Council through an online survey of 1,001 U.S. adults from August 26-30, 2021



... health care research

Checking vital signs

Pressure on hospital nurses drives some to quit

The past two years have offered a special kind of whiplash to nurses, who have cycled through being called heroes, getting laid off, working in critically understaffed conditions and being chronically underpaid. According to

a survey conducted by Hospital IQ, this state of constant crisis for frontline nurses might ultimately end up driving them from their jobs – and maybe even the nursing field altogether.

The majority of the 201 U.S. hospital-based nurses surveyed, 90% of respondents, are considering leaving the nursing profession in the next year, with 71% of RNs that have over 15 years of experience thinking about leaving as soon as possible or within the next few months.

This leave-taking isn't primarily a result of vaccine mandates. However, 83% of respondents said that their hospital has mandated the COVID-19 vaccine and 30% of these nurses are both opposed and are thinking of leaving their facility because of it. The remaining 70% either support the mandate or are opposed but plan to continue working at their facility regardless.

Hospital nurses are largely overwhelmed and understaffed; 45% of RNs said the estimated ratios across shifts are five or more patients to one nurse, with 84% of emergency room nurses and 96% of intensive care unit or critical care nurses saying they were four-to-one or higher.

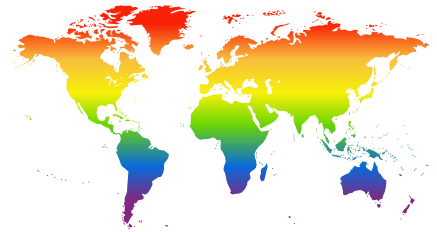
The problem didn't just begin with the pandemic, even if it was amplified by it. Seventy-two percent of respondents said they were experiencing burnout prior to the pandemic and 43% said a shortage of technicians meant they were doing more tasks like cleaning units, procuring supplies and managing clerical duties as part of their workload. Thirty-nine percent said they were experiencing more serious mental health issues like anxiety or depression due to their increasing job demands.

Nurses are also challenged by the public-facing parts of the job. Half (51%) of respondents feel a "lack of empathy" from their patients' family members and 47% said family members had acted "more entitled and demanding." Four out of 10 said at least one family member they've engaged with had been "verbally or physically aggressive" with them.

The pressure on nurses and staffing shortages also impact patient care; 38% of respondents said they had seen an increase in patients returning for post-

discharge secondary care, with another 38% saying they'd seen an increase in medication errors or delays. Thirty-six percent have seen patients with acute conditions walk out of an ER because the wait for a bed was so long.

The study was conducted by Censuswide on behalf of Hospital IQ and surveyed 201 U.S. hospital-based nurses in November 2021.



... LGBTQ research

A world of a difference

Opinions on LGBTQ issues vary by age, country

You've probably noticed a generational difference when it comes to folks supporting LGBTQ rights or identifying as LGBTQ themselves. However, research from Ipsos highlights just how wide this gap really is as well as the ways in which different countries vary in their opinions on LGBTQ issues.

Ipsos' LGBTQ+ Pride 2021 Global Survey surveyed 19,069 adults ages 18-74 from 27 countries and found that those who identify as transgender, nonbinary, nonconforming, gender-fluid or other than male or female make up 4% of Gen Z (born since 1997) compared to 2% among Millennials and 1% among all adults. Younger adults are also significantly more likely to identify differently from heterosexual and to say they are equally attracted to both sexes.

The survey also shows how much exposure to LGBTQ people and engagement with the LGBTQ community varies across the world. For example, 66% in Brazil report having a gay or lesbian relative, friend or colleague vs. 7% in Japan and South Korea. In the United States, 57% say they have a relative, friend or co-

worker who is lesbian or gay, 30% one who is bisexual, 14% one who is transgender and 14% one who is nonbinary, nonconforming or gender-fluid.

Anti-discrimination laws and equal marriage and adoption rights for LGBTQ people are supported by majorities in most of the 27 countries surveyed, including the U.S., but are fiercely opposed in several countries. In the U.S., 72% say same-sex couples should be allowed to marry or to obtain some legal recognition (15% say they should not be allowed any legal recognition), 72% agree that same-sex couples should have the same rights to adopt children as heterosexual couples do (22% disagree) and 60% support laws banning discrimination against LGBTQ people when it comes to employment, access to education, housing and social services (21% oppose them).

Overall, respondents showed more support than opposition toward corporate activism promoting equality – 47% support these initiatives vs. the 19% who oppose them on average globally (48% vs. 20% in the U.S.). Additionally, majorities in most – but not all – countries support LGBTQ people being open about their sexual orientation or gender identity with everyone. And there is generally more support than opposition toward LGBTQ people displaying affection in public (37% support vs. 27% opposition globally, and 41% vs. 27% in the U.S.) and more LGBTQ characters on TV, in films and in advertising (35% support vs. 25% opposition globally, 39% vs. 27% in the U.S.).

There is also a great deal of support in most countries for lesbian, gay and bisexual athletes in sports teams being open about their orientation. On the other hand, when it comes to allowing transgender athletes to perform according to the gender with which they identify, public opinion is divided and varies widely across countries. On average globally, 32% support it, 32% oppose it and 36% are neutral. In the U.S., 27% support it, 45% oppose it and 28% are neutral. Americans' opinion on whether to allow transgender athletes to perform based on the gender with which they identify largely reflects their political party identification: More Democrats support it than oppose it (42% vs. 24%), while more Republicans oppose it

than support it (75% vs. 11%).

The study was conducted by Ipsos and surveyed 19,069 adults aged 18-74 in the United States, Canada, Malaysia, South Africa and Turkey, and 16-74 in 23 other markets between April 23-May 7, 2021.



... leisure research Between the pages

Books get a boost during the pandemic

It's no secret that, as our lives began to take very different shapes due to COVID-19, most all of us were searching for ways to find a little levity (and sanity). For many, this search resulted in a renewed passion for reading. According to a Book Riot survey of its members, more than half (58.4%) of respondents have been reading more since the pandemic. But reading isn't a stress-reliever for everyone – 18.2% said they're actually reading less and 23.3% reported that the amount they read hasn't changed.

Most (70%) said they're reading the same book length as usual, while 14.7% are delving into longer reads (which tracks with the increase in 17.3% increase in nonfiction and 8.2% increase in fantasy) and 15.1% said they're reading shorter books now.

Indie booksellers and Amazon have a corner on book buyers currently, with 31% of respondents reporting that they're buying more books from independent bookstores and 27% saying the same about Amazon. Eleven percent are buying more books from chain bookstores like Barnes and Noble and 18% said they're buying more books from used bookstores. Just 4% are book shopping at big-box stores like Target and Costco and 16% said they're buying from

another option not listed.

Book clubs have taken a hit during the pandemic, with 4% disbanding their book clubs entirely and 6% pausing club meetings until it feels safe to start again. For those who took their book clubs virtual, 9% will stay online and 15% have returned to in-person meetings. One percent never stopped meeting in person through the pandemic.

We learned to love digital during COVID-19 and that applies to our reading formats as well. Forty-seven percent of respondents have changed reading formats during the pandemic and most of this shift is toward digital formats. Twenty-two percent are listening to more audiobooks vs. 4% who are listening to fewer. E-books, too, have seen a lift, with 29% saying they're using this format more as opposed to the 2% who say they're using it less. Eleven percent are reading more physical books, while 11% are also reading fewer.

When asked about public library usage during the pandemic, 28% said they were using it more, 25% said they were using it less and 47% said they were using it about the same. A quarter (25%) of respondents are using libraries more and will continue to do so, while 6% are using them more but will stop when they can. Thirty-two percent of respondents said they didn't use their library before and won't in the future but 37% reported that although they didn't use their library in the past, they'll be visiting it in the future.

There were a few distinct shifts in genre among book lovers as well, with 33% of readers saying that the genre of books they're reading has changed. This notably includes fantasy (8.2%) and light fiction like "beach reads" (7.9%). But 17.3% of respondents said they're also reading more nonfiction, which makes sense given not only our increased awareness of world affairs but also the call from activists to educate ourselves. Nonfiction readers were matched only by those who picked up more romance during the pandemic – 17.5% of respondents – which, again, stands to reason given our current reality. What better balm for trying times than that shiny, discounted paperback that always offers a happy ending, no matter the twists and turns the story takes?

Book Riot surveyed 5,117 members in July 2021.

QUIRK'S TALENT

Executive Recruiting for
Market Research and Insights Professionals

COMPANIES



CANDIDATES

Quirk's Talent is a new executive recruiting service specializing in identifying and placing professionals in the market research and consumer insights industry.

With both full-time and interim placements Quirk's Talent is the ideal solution for matching research professionals with open opportunities in our industry – and it is from a name you can trust!

www.QuirksTalent.com

Quirk's Talent is offered in partnership with Trusted Talent, LLC.

••• special advertising section

10 TOP BRAND/IMAGE RESEARCH COMPANIES

What comes to consumers' minds when they think of your brand? Developing a positive – and accurate – brand image can ensure repeat customers and attract new ones, while a negative or misleading image can undermine your business.

The following companies understand the importance of brand and image research and specialize in helping clients from consumer to B2B conduct the research necessary to navigate their market and develop a winning brand strategy. From quantitative to qualitative, the following companies offer an array of innovative products and services, whether your research needs require DIY solutions or full-service assistance.



Decision Analyst

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



Decision Analyst offers an array of services to help clients develop and sustain winning brands. The firm melds in-depth qualitative investigations, strategic survey research, advanced analytics, mathematical modeling and simulation to solve complex marketing problems. Decision Analyst specializes in strategy research, branding optimization, new product development, new product concept testing and volumetric forecasting, virtual shelf sets and package testing, brand name research, pricing studies, in-home product testing and advertising research. The firm focuses on consumer packaged goods, pharmaceu-



Fieldwork

Founded 1980 | 250+ employees
Steve Raebel, President



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

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

ticals, medical devices, online retailing and traditional retail, technology, food service and restaurants, financial services and the automotive industry.

Phone 1-817-640-6166
www.decisionanalyst.com/services/brand-consulting



Discuss.io

Founded 2012 | 57 employees
Simon Glass, CEO

Discuss.io is helping the world's largest companies turn experiences into insights. As the go-to purpose-built qualitative research platform, CX, UX and insights teams, enterprise-level brands and agencies trust Discuss.io to enable deep, purposeful connections with their key



audiences and to securely capture and share insights across their organizations in real time. By giving voice to people's experiences to drive insights and outcomes, Discuss.io is helping to transform the brand and customer relationship and usher in the new area of customer intelligence. Our award-winning technology has enabled hundreds of enterprise-level brands and their partners around the world including Unilever, Target, Ipsos and Mastercard, to deliver a new approach for the market research industry. For more information, visit www.discuss.io.

Phone 1-866-557-6716
www.discuss.io



InsightsNow

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



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

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



Ironwood Insights Group LLC

Founded 2017 | 300 employees
Brian Cash, VP Research Services

Ironwood Insights Group provides consultation and execution across the research services spectrum: design, data collection and analysis. We champion a simple principle: High-quality data + insightful consultation = actionable, durable business outcomes.



Our approach to brand health is grounded in action and focused on navigating the upsides and downsides that brands face in a dynamic marketplace. We start by understanding the impact of key emotional and functional attributes on brand preference and then identify the salient opportunities to maximize brand potential and minimize risk. Relationships between these key attributes are then isolated to identify the best pathways to improving brand performance. And because brands do not exist in a vacuum, we pinpoint opportunities to differentiate, versus key competitors, on the attributes that matter – today and tomorrow. Contact us to learn how we can help you find the “Insights that provide clarity and drive action.”

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

E-mail susan@murrayhillnational.com
Phone 1-972-707-7645
www.murrayhillnational.com





OvationMR

Founded 2017
Jim Whaley, CEO



Fast, Reliable Answers for Insightful Decisions®. Significantly improve your online research success with dependable survey data from B2B and consumer audiences. Our mission: Expand opportunities for researchers to do the work you believe in and can stand behind, for your company, your community and your cause. OvationMR services cover sampling, programming and hosting, translations and design and analysis for brand tracking studies, market segmentations, conjoint analysis, awareness and usage studies, customer experience, concept testing and political polling. Our clients include research practitioners, consultants, governments, NGOs and global brands. We offer survey audience sampling and supporting research services globally. Contact us today at: info@ovationmr.com.

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



Provoke Insights

Founded 2014 | 8 employees
Carly Fink, President

Provoke Insights is a full-service global market research and brand strategy firm. Founded on the premise that research should better align with mar-

keters' needs, Provoke Insights empowers brands with the insights they need to navigate the cluttered marketing space and improve ROI. We do not conduct research for the sake of research; we create strategic plans tailored to versatile brand needs. As a team of market research experts and brand strategists, we ensure that questions are deeply explored and insights are cultivated and capitalized. Our agency works with a diverse range of clients, from start-ups to Fortune 500 companies. Current, creative and agile — we enjoy creating impactful solutions that deliver value for today and the future.

Phone 1-212-653-8819
www.provokeinsights.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. Looking to assess brand health? Toluna's unique, automated brand health framework can help you understand your brand's performance – now and into the future – by providing critical qualitative and quantitative metrics to guide the steps you need to realize your full potential.

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



Consumer Insights.
Market Innovation.

TRC Market Research

Founded 1987 | 50 employees
Rich Raquet, President



TRC is a market research and analytics firm. We specialize in brand equity research, measuring brand value to help find optimal pricing structures to maximize revenue. At TRC, we bring senior-level attention to every project and take pride in our reputation for providing our clients with consistent high-quality insights. We have long-term collaborative relationships with our clients and deliver fresh perspectives including those of our many academic partners. Our clients range from Fortune 500 companies to medium-sized businesses poised to grow. Our expertise reaches industries such as health care, fintech, banking, pharma, medical devices, insurance, consumer packaged goods, business-to-business and technology.

Phone 1-800-275-2827
www.trcmarketresearch.com



Three survey-based methods for pricing research

|By Bryan Orme and Keith Chrzan

snapshot

Authors Bryan Orme and Keith Chrzan argue that conjoint analysis is the best option.

We all know how important it is to figure out the right price to charge. After all, price is one of the key levers in marketing! Charging the right price lets you capture the value and profits your business has earned. So how do we determine an optimal product/service price?

Researchers and academics have proposed multiple survey-based pricing research approaches over the decades (described below) but conjoint analysis is one of the most realistic, powerful and widely trusted approaches.

Before delving into survey-based methods for pricing research, we should recognize that it is possible to conduct pricing research using real sales data. We could conduct in-market pricing research tests to vary our price and capture sales data from paying customers but this can be expensive and risky. Plus, what your competitors do during your in-market test could foul up your pricing experiment.

We could also analyze past sales data to develop models that predict market reactions to price changes. However, existing data often aren't robust enough, with enough independent price changes to stabilize the kinds of predictive models needed to pinpoint optimal price points for revenue or profit.

On top of the challenges facing in-market tests and models based on existing sales data, crucial blind spots are that they cannot deal with not-yet-launched products, proposed modifications to existing products or setting prices for proposed line extensions. Survey-based techniques, especially conjoint analysis, are recommended for these common situations.

Three approaches

Survey research lets you test different prices and measure the price sensitivity for consumers and key market segments – before you go to market. Unless the survey is realistic and mimics the buying decision (and this can be challenging to do), respondents aren't going to give you accurate data about how price motivates them. Are there effective survey-based methods for setting optimal prices? Three approaches are commonly used: Van Westendorp's price sensitivity meter (PSM), Gabor-Granger and conjoint analysis. As we explain below, the first two techniques have key drawbacks. Conjoint analysis (aka, discrete choice experiments), when done well, tends to be more realistic and useful than the other two approaches.

Van Westendorp price sensitivity meter

The original approach, the price sensitivity meter (Van Westendorp 1976), asked four questions about the respondent's perception of expected prices.

- At what price would this product be so cheap that you would doubt its quality and not consider it? (called the "too cheap" price)
- At what price would this product be a bargain – a great buy for the money? (called the "acceptably cheap" price)
- At what price would this product seem expensive, but you would still consider buying it? (called the "acceptably expensive" price)
- At what price would this product be too expensive for you to consider? (called the "too expensive" price)

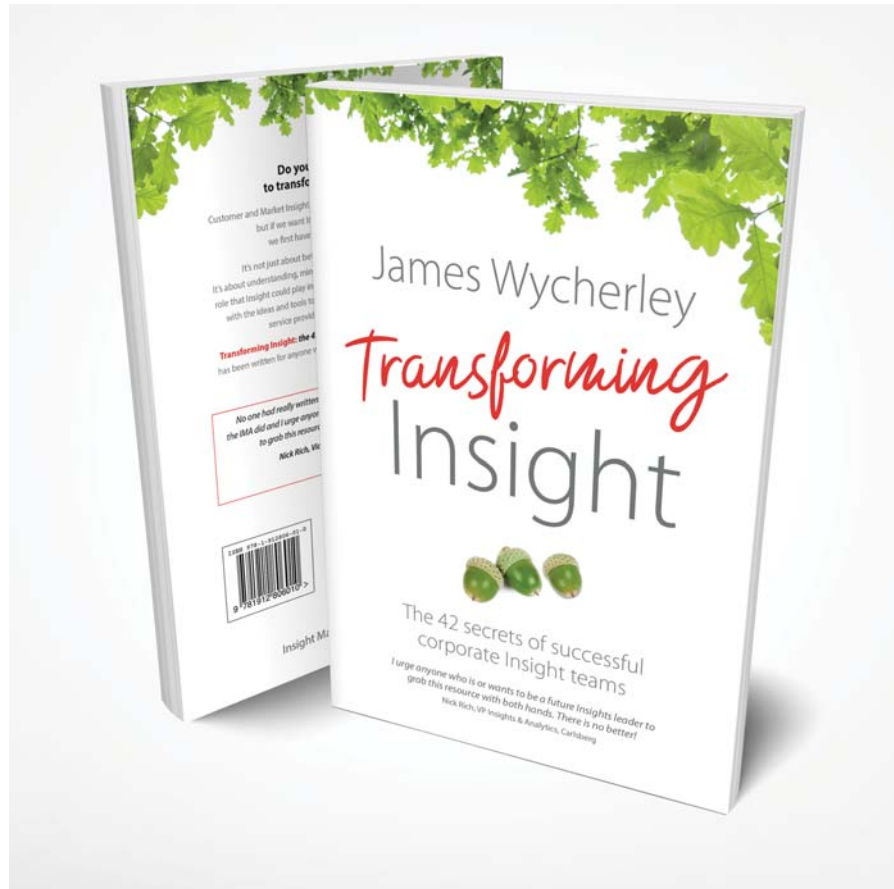
Do you have the ambition to transform your Insight team?

Customer and Market Insight has the potential to transform any organization.

But if we want Insight to transform our companies, we first have to transform our Insight teams.

The IMA is the world's leading authority on transforming corporate Insight teams.

It provides its members with inspiration and guidance through advice, benchmarking, publications, training and the Insight forums.



This is the year for

Transforming Insight



Read the book

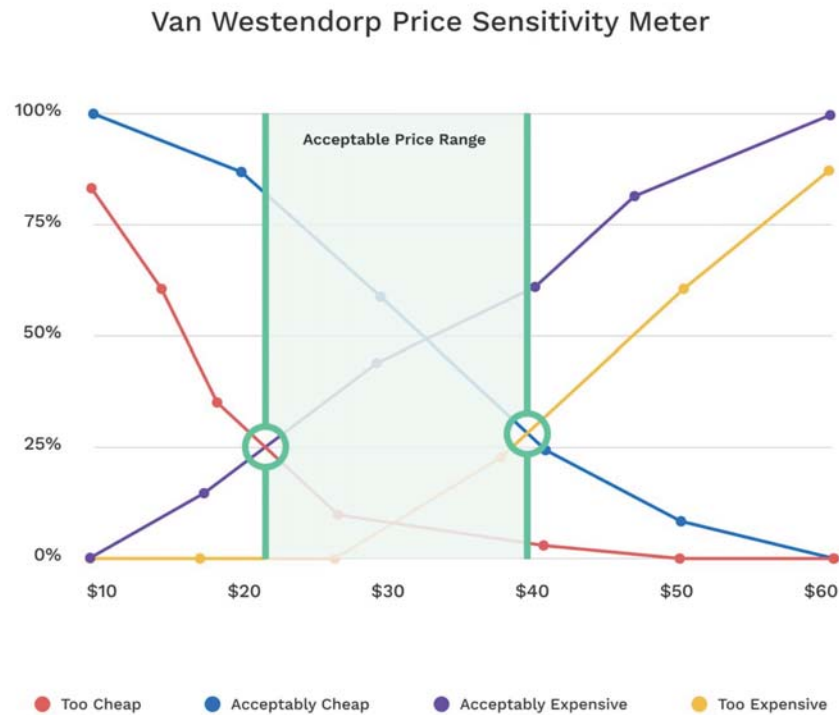


Review capability



Prioritize development

Figure 1



The four pricing questions above directly ask respondents to tell us their “too cheap,” “cheap,” “expensive” and “too expensive” price points. It only takes a minute or so for respondents to answer, so it’s indeed quick and easy.

Van Westendorp proposed that a plot of the four curves (cumulative percent of respondents) could diagnose the acceptable price range for a product (shown in green shading). Other intersections (inside the green shading but not highlighted here) would indicate what Van Westendorp called optimal and ideal price points. In the chart in Figure 1, for example, the percent of respondents who think \$20 is “too cheap” is 25%. The percent who think \$40 is “too expensive” is 28%.

The Van Westendorp PSM approach lacks a clear link with likelihood of product choice but the Newton-Miller-Smith purchase intent extension (Newton et al. 1993) adds two five-point-scale purchase intent questions (“definitely would purchase” to “definitely would not purchase”) asked at the two middle prices (acceptably cheap and acceptably

expensive) and lends more credibility.

With the Newton-Miller-Smith extension, for each respondent we can create a demand curve (with purchase likelihood) at each of the four price points. To do so, it’s typical to discount the purchase likelihood (on the responses to the two interior price points) with likelihoods such as:

- Definitely would purchase: 70%
- Probably would purchase: 25%
- Might or might not purchase: 10%
- Probably would not purchase: 0%
- Definitely would not purchase: 0%

(These calibrated likelihoods could be adjusted, given more knowledge of the particular product category.)

Newton-Miller-Smith originally proposed that the purchase likelihood at the “too cheap” and “too expensive” points should be set to 0% for each respondent. However, it seems more reasonable (following economic theory) to believe that purchase likelihood for the “too cheap” price should be

modestly higher than the respondent’s purchase likelihood at the “acceptably cheap” price (Orme 2016, Shan 2021). After all, it wouldn’t take long for buyers to see reviews and reports that a product they initially thought seemed too cheap indeed was delivering good value for the money.

Consider the derived demand curve shown in Figure 2 for a respondent who gives PSM prices of \$20, \$28, \$37 and \$45 for the four price points; and for the N-M-S extension indicates “definitely would purchase” at \$28 and “probably would purchase” at \$37.

Averaging the demand curves across respondents leads to a market-based demand curve, further allowing us to derive a total revenue curve by multiplying price by purchase likelihood at each point along the price continuum. The modified proposal with the dotted line (avoiding the upward sloping portion of the demand curve, per economic theory) leads to modestly lower recommendations for optimal price points compared to the original N-M-S proposal.

The Van Westendorp PSM approach lacks grounding in economic theory for finding the optimal price point. It’s somewhat like reading tea leaves to think that the ideal price should be determined by an intersection of cumulative plots of the four price-point questions. The Newton-Miller-Smith extension improves the approach. However, even with the N-M-S extension, the respondent’s purchase intent ratings are typically not being made in a realistic competitive context.

Furthermore, the approach is limited to typically studying just a single or very few variations of a product concept. For brand-new-to-the-world products without an easily established competitive context, this approach could be a good first step. But conjoint analysis is generally better and indeed could be used as a more rigorous follow-on study.

Gabor-Granger approach

This approach involves asking respondents if they would buy a product at a

Figure 2

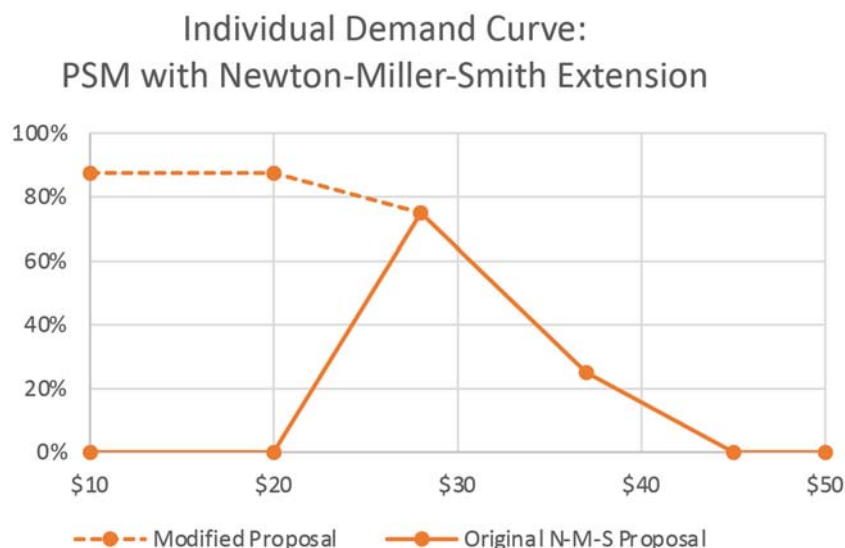
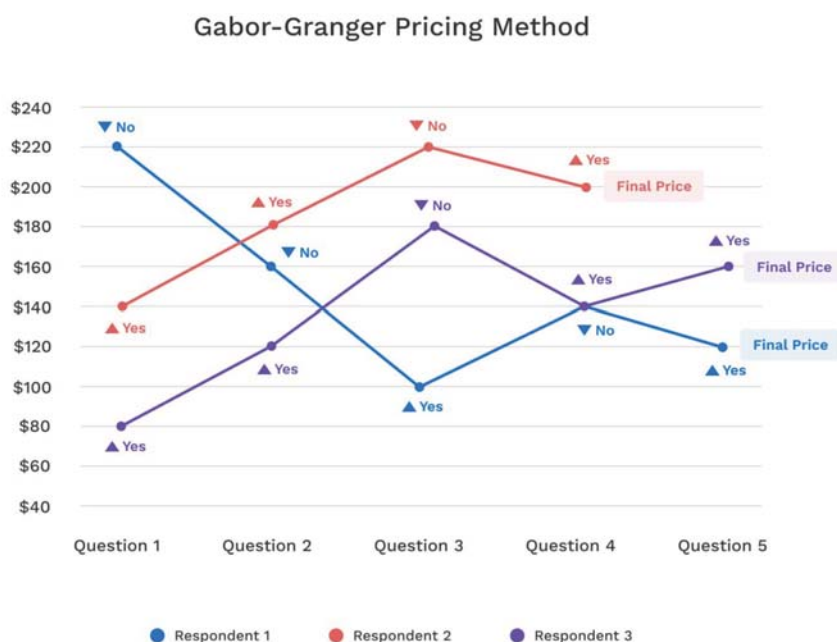


Figure 3



given price (Gabor and Granger 1966). If they say yes, then we ask the question again at a higher price. If they say no, then we ask the question again at a lower price. As with the PSM approach, it takes very little time to answer these questions. But there are also multiple problems with this approach. For example, no relevant competition is typically shown to provide adequate

context. Moreover, the price point we begin asking the respondent about strongly biases the outcome.

The chart in Figure 3 shows outcomes for three representative respondents. Averaging across all respondents leads to a market-based prediction of the demand curve, with the same possibilities for deriving a revenue curve as the Van Westendorp

(with N-M-S extension) approach.

With the Gabor-Granger approach, it's clear to the respondent that this is a pricing game. This, in our opinion, harms the perception of realism and can lead to biased results. As with the Van Westendorp PSM approach, the respondent usually is not comparing the test product against relevant competition and the approach is limited to typically studying just a single or a very few variations of a product concept. In short, we cannot think of a good reason to recommend the Gabor-Granger approach.

Just one or a very few

A big weakness of the above approaches is they try to determine pricing for usually just one or a very few versions of the product concept, not thousands or millions of variations like conjoint analysis can deftly handle.

Conjoint analysis pricing research has become a widely accepted and trusted method because the conjoint survey experience creates a more realistic environment where the respondent makes choices (and can price-compare) truer to what they see and do in the real world. Figure 4 shows an example conjoint analysis question.

Conjoint analysis questions systematically vary the features shown and their prices and respondents pick which product they'd most likely choose in each carefully rotated scenario.

Based on how respondents react to price and other feature changes, we can more reliably fit a model (typically hierarchical Bayesian logistic regression) that reveals their price sensitivity (price elasticity) and willingness to pay (WTP). Or, in other words, we can learn how quantity demanded changes with changes in price.

Conjoint analysis takes more effort in the planning (developing an appropriate list of attributes and levels to cover the firm's product as well as relevant competition) and requires a higher level of experience along with widely available statistical tools to analyze than the simpler approaches previously discussed. For

Figure 4

If you were in the market for your next mobile phone and these were the only alternatives, which would you choose?

Brand:	Apple	Samsung	Apple	LG
Model:	iPhone 12	Galaxy S20	iPhone 12 Pro	G7, ThinQ
Screen Size:	6.1 Inch	6.5 Inch	6.1 Inch	6.1 Inch
Price:	\$699	\$699	\$999	\$499
	<input checked="" type="button" value="Selected"/>	<input type="button" value="Select"/>	<input type="button" value="Select"/>	<input type="button" value="Select"/>

respondents, it takes about three to eight minutes to complete a conjoint analysis survey. Sample sizes are sometimes larger than one would use for the other two methods mentioned here but usually in the range of 300 to 800 respondents. It requires more in-depth thinking on the part of the respondent (which is a good thing), more akin to the making purchase decisions in the real world.

If it isn't obvious yet, we think the endeavor is well worth the effort and investment. If you'd like to experience a conjoint analysis survey and see how it estimates price sensitivity curves and leads to a what-if market simulator, we recommend you take an example survey with real-time results at www.sawtoothsoftware.com/baseball. The example conjoint study takes you through a sample conjoint questionnaire, asking about your food preference at a baseball stadium and then lets you review the results based on the cumulative data

from all survey responses gathered.

Like a voting machine

Conjoint analysis has become valuable over the decades for marketers and pricing managers due to the intuitive usefulness of the market simulator. The simulator is like a voting machine, where the manager can specify a competitive market scenario (involving the manager's product vs. relevant competition) that interactively yields a market share-type prediction (called "share of preference").

This market simulator often is in Excel or in a web-enabled application. You specify different features and prices for your product (as well as for its relevant competition), run the market scenario simulation and see the predicted share (share of preference).

The market simulator shows how raising or lowering price (relative to your competitors) changes the predicted share, revenue and profits. To

predict profits, you also need to tell the simulator how much it costs to produce your product.

For example, Figure 5 shows a profit optimization curve as revealed by a conjoint analysis market simulator.

We can even use market simulators to search for optimal prices and features for tiered product-line offerings, such as gold, silver and bronze levels.

Effective pricing research method

Choice-based conjoint (aka discrete choice experiments, Louviere and Woodworth 1983) has been employed by academics and practitioners for decades and there are a variety of both commercial and open-source tools available. Because choice-based conjoint shows respondents sets of competing products with realistic features and price ranges similar to how buyers see and evaluate products in the marketplace, CBC is an effective pricing research method.

A strength of CBC is that we do not need to assume each brand has the same price sensitivity. Depending on the brand's reputation and brand equity, price elasticity can and should differ.

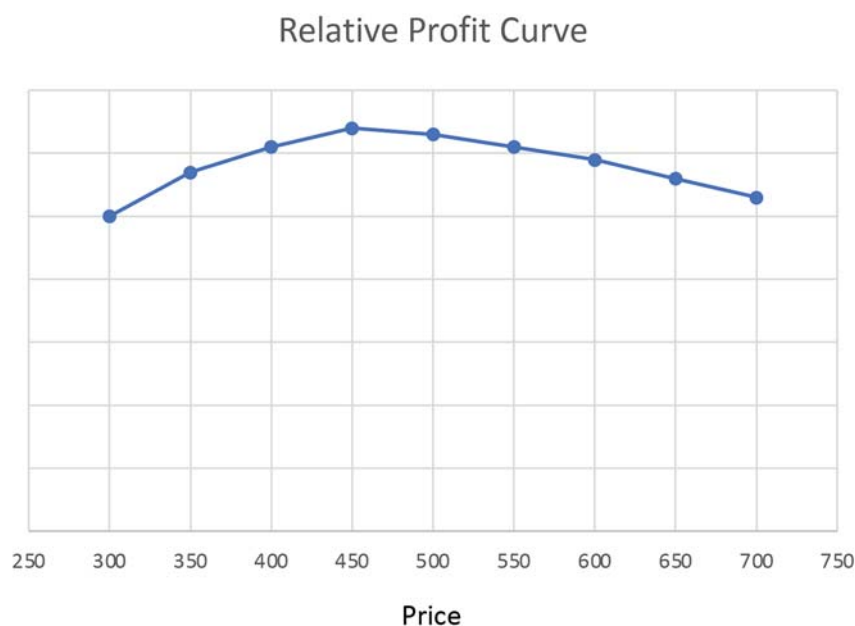
CBC's experimental design permits efficient estimation of brand-specific price curves. In some circumstances, measuring price sensitivity uniquely by brand can lead to more accurate pricing decisions and optimization.

Unmotivated respondents or bad actors (cheaters) are a problem in survey research. This is especially a concern with pricing research. If you have respondents who randomly answer conjoint questions, it can make it look like

Table 1

Method	Strengths	Weaknesses
Van Westendorp PSM with N-M-S Extension	<ul style="list-style-type: none"> • Quick/easy for respondents • Easy for the researcher to program and analyze 	<ul style="list-style-type: none"> • No competitive context • Focuses on usually just one product
Gabor-Granger	<ul style="list-style-type: none"> • Quick/easy for respondents • Easy analysis 	<ul style="list-style-type: none"> • No competitive context • Focuses on usually just one product • Clearly a "pricing game" to respondents
Conjoint Analysis	<ul style="list-style-type: none"> • More realistic decision-making context • Can test thousands or millions of product/price combinations in one survey 	<ul style="list-style-type: none"> • Takes more thought/expertise to develop survey questions • 3-8 minutes of effort for respondents • Requires commercial or open-source statistical software

Figure 5



people are willing to pay much higher prices than real buyers would.

Fortunately, conjoint analysis leads to an individual-level goodness-of-fit statistic to help you prune the bad actors. You should also use speed checks and quality-of-open-end-question checks to clean the data and obtain better pricing research insights.

The Sawtooth Software Conferences give companies an opportunity to talk about how they use conjoint analysis for pricing decisions and optimizing profits/revenue. Some recent examples include:

Microsoft: Researchers at Microsoft's peripherals division used conjoint analysis to figure out the right price to charge for improvements to their products. They also demonstrated how conjoint analysis simulators can be used to optimize a product line involving multiple products.

Procter & Gamble: P&G's researchers compared conjoint analysis to econometric models they've built from real market purchase data. On average, they found good correspondence between

price sensitivity measured by conjoint analysis compared to real market data.


Lifetime Products: Lifetime's researchers were able to convince a big-box retailer that Lifetime's utility chairs and tables could command and deserved a price premium using findings of conjoint analysis studies.

Amazon: Researchers in Amazon Devices have found that conjoint analysis can help them predict product launch success across multiple markets.

We mentioned earlier the importance of trying to make a pricing research survey resemble the real buying process. At the 2013 Sawtooth Software Conference, Fuller and Buros described a realistic-looking menu-based conjoint analysis pricing study conducted for HomeAway, a residential-based home-booking service for travelers, later bought by Expedia. Even though the questionnaire clearly stated to respondents that they were making hypothetical choices of home bookings, the researchers reported that "HomeAway

received numerous calls from its subscribers asking why their 'choices' in the task had not appeared in their listings." HomeAway implemented the pricing recommendations gleaned from the conjoint analysis study and the researchers reported, "Average revenue per listing increased by roughly 15% over the prior year" (Fuller and Buros 2013).

Worth the thought and effort

We've summarized the strengths and weaknesses of the different survey-based pricing approaches covered in this article in Table 1. Although conjoint analysis is more challenging for both the respondent and the researcher alike, the results are well worth the additional thought and effort. 

Bryan Orme is CEO and president, and Keith Chrzan is senior vice president, at Sawtooth Software. They can be reached at bryan@sawtoothsoftware.com and keith@sawtoothsoftware.com, respectively.

REFERENCES

- Gabor, A., and Granger, C.W.J. (1966). "Price as an indicator of quality: report on an enquiry." *Economica*, 33(129), 43. doi:10.2307/2552272.
- Louviere, J.J., and G.G. Woodworth (1983), "Design and analysis of simulated consumer choice or allocation experiments: An approach based on aggregate data." *Journal of Marketing Research*, 20:350-367.
- Newton, D., Miller, J., and Smith, P. (1993), "A market acceptance extension to traditional price sensitivity measurement." *Proceedings of the American Marketing Association Advanced Research Techniques Forum*.
- Orme, B. (2016), "Van Westendorp price sensitivity meter (PSM) Templates." Downloaded from: <https://sawtoothsoftware.com/resources/software-downloads/tools/van-westendorp-price-sensitivity-meter>.
- Shan, M. (2021), "Enhancement of Van Westendorp price model via newer statistical approaches." 2021 Sawtooth Software Conference. Provo: Sawtooth Software.
- Van Westendorp, P. (1976) "NSS-price sensitivity meter (PSM) - A new approach to study consumer perception of price." *Proceedings of the ESOMAR Congress*.

“Well done! Clear Seas is a pleasure to work with. Of all the professional relationships I have made in the floor covering business, the one I hold with you and your team is my most treasured. Thank you for your hard work.”

— Flooring Industry Market Research Professional

Trust

IN RESEARCH

Strategic, full-service market research solutions focused on measuring...

- **BRAND EXPERIENCE**
Creating B-to-B Brand Obsession
- **PRODUCT EXPERIENCE**
Putting Customers at the Heart of your B-to-B New Product Launch
- **CUSTOMER EXPERIENCE**
Strategic, Continuous, and Corrective Monitoring of your B-to-B Customers' Experience

To know what we know, please contact us at 248-786-1683 or info@clearseasresearch.com



BUSINESS-TO-BUSINESS & CONSUMER INDUSTRY EXPERTISE

- BUILDING ENVELOPE
- ARCHITECTURE
- PLUMBING
- HVAC
- ENGINEERING
- ROOFING
- FOOD & BEVERAGE
- GAMING
- MANUFACTURING
- PACKAGING
- SECURITY
- DISTRIBUTION/LOGISTICS


Clear Seas
RESEARCH
Making the complex clear
www.clearseasresearch.com

••• the business of research

Profit before people

The dirty secret of the research world?

| By Stephanie Rowley



snapshot

Stephanie Rowley looks at the toll that overwork and burnout are taking on marketing researchers and urges an industry-wide effort to change our business practices.

One evening last summer, I was doing some freelance work, supporting a director-level researcher with a significantly sized project. After the fieldwork was finished, I commented on how tired he seemed. Not just “after fieldwork” tired, but really, totally exhausted. He brushed it off, but said, “Yeah, I guess the last few months have been pretty relentless. I work almost every weekend just to stay on top of things.” Quite suddenly, he broke down in tears. Unfortunately for him, he had to pull it together quickly, because although it was already 10 p.m., we were meeting the clients at 10:30 p.m. to go through our initial findings. I should also mention that it was a Friday night. And not only that, he was viewing international fieldwork the next day – Saturday – at 6 a.m. This had become the norm in his working life.

I recently had a coaching client who told me that he’d been signed off by the doctor with exhaustion and stress but he was still going to work because he felt that he “didn’t have the time to be off sick.”

Another client had been signed off for three weeks and her boss said, “I know you’re not technically working, but if you could just keep an eye on your e-mails that would be helpful.”

And what about the researcher who told me, as they were leaving for a two-week holiday with their extended family, that they had decided to limit their working hours to just two hours a day while they were away?

Are you surprised by these stories? I would hazard a guess that you’re not. I’d be shocked if there’s anyone reading this who hasn’t personally experienced this way of working or seen their colleagues go through it.

Research recently conducted by Opinium in collaboration with the Market Research Society in the U.K. and the Insights Association in the U.S. paints an equally worrying picture: 87% of researchers in both markets reported that they had experienced poor mental health in the last year; 70% of U.K. researchers and 77% in the U.S. have experienced



stress in the last 12 months; and 45% in the U.K. and 58% in the U.S. have experienced exhaustion/burnout.

The top sources of stress in both markets? Heavy workloads, long hours and impending deadlines. Few researchers, particularly in the U.K., took time off for their mental health. And amongst those who didn't, what was the top reason? Having too much to do.

So here we find a situation where having too much to do is impacting people's mental health and having too much to do is the reason people can't do anything about it.

Which brings me to the heart of my point: workloads – the demands placed on researchers, project managers and ops teams, client-side and agencies alike; the sheer intensity and pace of work.

I think it's getting out of hand, it's damaging people's physical and mental health and it has to stop.

Irony beyond belief

The MRS defines the U.K. research insight and analytics industry as the “monitoring, measurement, and understanding of markets and societies in support of well-informed and evidence-based decision-making.” And so I wonder: What decisions is the industry making, faced with the undeniable evidence that feeling burned out, overwhelmed and exhausted is a real and significant issue for researchers? The irony of an industry that is based on understanding human behaviors failing to turn the lens on itself, to understand what's going on, to see the insights and to take action, is beyond belief, and it makes me angry.

Because there IS no obvious action. What is going on when we have professional, intelligent, capable adults reduced to tears, being signed off work or toiling away while on holiday because of their workloads?

This seems like an appropriate point to bring in the topic of work-

place well-being programs or employee assistance programs. They are definitely growing in popularity and of course that's good to see. But they mean absolutely nothing if people are being pushed to the limit by the amount of work they have to do.

It's not about knowing how to practice mindfulness or being encouraged to take breaks or exercise. It's about making it stop, breaking the cycle, reducing the stressors in the first place.

And by providing tools to help people manage their well-being, does that simply transfer the onus from the employer to the employee? Is it saying to them, we'll give you a way to try and cope when it inevitably gets too much? Is it off-loading responsibility? I fear that all too often, such programs are performative tick-box exercises, well-intentioned but missing the mark at best and virtue-signaling at worst.

Let me be very clear: I'm not here to knock such initiatives. They definitely have their place; it's important to have systems to support people when they are struggling, feel that their mental well-being is suffering or they're burning out or overwhelmed. But these efforts don't work in isolation and they're not silver bullets.

Isn't it better that people just don't get to that stage at all? To me, there are no kudos to be earned for supporting someone once they've had a burnout – a burnout that their working environment has effectively created. How about just not enabling an environment where that's going to happen?

Not realistic

I'm not talking about a utopia where nobody ever feels a moment of stress or feels overwhelmed again. As nice as that would be, it's not realistic. But why is people's mental health and well-being being sacrificed to the gods of revenue and profit? Because that's what is ultimately happening. When will companies stop choosing profits over people? When will enough be enough? If the current statistics aren't sufficient to drive serious and immedi-

ate changes in the way we work, then what does have to happen before the industry sits up and takes notice? There has to be a line between well-being and profit. But I fear that it has disappeared, far behind us in the rear-view mirror.

I'm not naïve – I know that there are targets that have to be met, that revenue and profit are required to sustain any business. There probably aren't many companies who could easily accept the argument of, "Just say no to the work, because it will reduce the pressure on your team."

But actually, why not? Have companies become so greedy that we've reached the point where it's profit at all costs? People are leaving the industry because they can't stand it anymore. Good people. And that comes with a cost of its own.

Let's start with the obvious: The financial outlay to hire someone new. Then there's the general disruption and additional pressure put on the rest of the team when a key person leaves, resulting in even heavier workloads for those left behind.

And what about the moral cost? That people are being driven out of careers that they enjoyed and were good at because they are being screwed in order to make as much money as possible? That people are ill, struggling to cope, their relationships are suffering, they're dreading going to work each day, because they have to hit a revenue target? How can that possibly be OK?

And what about the impact of these working conditions on the research itself? After all, we're talking about an industry that is built on intellectual capital. Writing a debrief or a proposal, late at night, in a fraction of the time that it really deserves, when you're exhausted – is that honestly the way to do your best work? Is that fair on anybody?

I know that the fabric of the industry is changing. Real people are competing with digitized processes and algorithms and that brings a lot of pressure. The focus on automation means that timescales are getting shorter and shorter. Everything needs to be faster and cheaper.

I also believe that as a sector, things haven't really moved beyond

transactional relationships. Many agencies pride themselves on forming partnerships with their clients and while that may indeed be true when it comes to the business implications of the research, all too often, when it comes to timescales and demands, we are stuck in a pattern where the client says jump and the agency asks, "How high?"

Not easy to pin down

So who's at fault here? That's not easy to pin down. Clients have their own deadlines, their own stresses and pressures; they too are subject to the ever-increasing requirement to prove their value and their worth, to stretch budgets and squeeze timelines as far as possible, to satisfy their stakeholders' demands. But when they ask for work to be delivered within tight timescales, do they understand what's involved and what impact that will have on agency teams? Should they? Is that their responsibility? Do they exploit the relationship knowing that agencies will pull out all the stops to keep them happy? Do they ignore the – often surely obvious – fact that someone is going to have to work over the weekend or late into the night to deliver what they're asking for? Should they be pushing back to their stakeholders, rather than rolling the problem on to the agency?

And should agencies be bolder in saying, "That can't be done, because it comes at a human cost that isn't going to be offset by adding an extra couple of grand on for a 'speedy turnaround project'"? By firing the clients who push too hard and have unrealistic expectations? Should agencies be working harder to educate research buyers on the amount of work that's actually involved in designing and delivering projects? By ultimately agreeing to all but the most impossible timescales, are agencies complicit in perpetuating the problem?

I think all parties are culpable. Whether people ask the questions or don't ask them, or feign unawareness, or ignore uncomfortable truths because they don't fit in with what businesses are trying to achieve, something isn't working and it has to be addressed.

Become a temporary fix

So what's the answer? Is it hiring more people? That's an obvious solution and a credible one – as long as it doesn't become a temporary fix, whereby more people are hired but then the targets are reworked to take into account the fact that there's a bigger headcount than there was last year, thus keeping the problem alive.

Is it about flexible working? I think that can certainly be part of the plan but, ultimately, choosing where and how you work isn't that much help in the face of a mountain of work that you simply don't have enough hours in the day to do.

Is it up to individuals to learn the skill of setting their boundaries? Yes, you can push back on your workloads but let's be honest: There are few people who are comfortable with digging their heels in and simply refusing to do something. Worries about how that will be perceived or how that will affect their colleagues makes that extremely challenging. It only works if everyone in the team does it and, once again, it puts the onus back on the individual to deal with the problem.

To me, it comes down to poor management and bad leadership. Because ultimately, leaders are allowing – if not facilitating – working environments and working relationships that are directly conducive to burnout.

It's a lack of respect. It's turning a blind eye because it's too complex to sort out and it bucks all the conventional thinking about how businesses in the sector operate. It's greed – profit over people.

There have to be systems in place to manage workloads better. Things have to be resourced properly.

Agencies have to be better at saying "sometimes" to their clients – "It's not a no, but it's a not-now, because the cost is too high and we are not prepared to pay that price."

Clients have to be better at acknowledging the reality of what they're asking for.

Vote with their feet

These things have to become the norm so that those who do try to do the right thing by their teams don't lose out to those who won't. So that people feel

empowered to vote with their feet and leave those irresponsible employers in search of healthier, more humane alternatives. So that it becomes universally unacceptable to run your business in a way that disrespects people's well-being and makes it hard for you to attract people to work for you.

Research is an industry that's filled with quality standards, guidelines and codes of conduct around how to conduct high-quality, ethical research. But where are the standards around working practices? Imagine an industry quality standard that labelled agencies and insights clients as being committed to not overburdening people. As ethical workplaces that don't push people to their limit and that give people the time and space they need to deliver good work and maintain a healthy life at the same time. Is that a naïve fantasy? Maybe – but only because it feels so far removed from where things are now.

And ultimately, if you are a leader in research, if you run an agency or you head up a team, you need to ask yourself these questions and answer


them honestly: Are we guilty of this? Are we OK with doing this to people? Are we OK with the fact that the very people who work so hard to make our businesses successful, whether we are agency or client side, are the ones that are suffering as a result?

If the answer's no – and I really hope that it is – then please, please stop and have a good hard think about how you can make a difference.

Prepared to be honest

For me, this all boils down to something quite simple: a sense of responsibility and accountability. Who is prepared to take responsibility for the decisions that they're making? Who is prepared to be honest and acknowledge that things are not as they should be? Who is brave enough to take a stand and say, "We're simply not going to work like that anymore" and hold themselves accountable for that? Who is really, really going to stop and consider that the decisions that they make have a direct impact on someone else's quality of life? Who is prepared to commit themselves 100% to chang-

ing the way we work and consigning burnout to history?

This isn't about individual people or companies, although it's a good start. This is about an industry-wide transformation. Reset, restart, recalibrate – whatever you want to call it. It's the right thing to do. It's a conscious choice. And it's a decision that can be made. I really hope – as a leader – you'll make it. 

Stephanie Rowley is the owner of Stephanie Rowley Coaching. She can be reached at steph@stephanierowley.co.uk.



 **QUEST MINDSHARE**

Global research. Global reach.
High-quality data collection to power online studies.

- > From ITDM to Business Owners, 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

••• agile research

Haste without waste

How to do agile research the right way

| By Bill Murray



snapshot

Bill Murray explains three universal concepts that drive the “how” of agile research and outlines other tactics that lead to agile success.

For as much talk as there is in marketing research circles about agile forms of research, there seems to be just as much uncertainty about what agile is – and isn't.

Help is here. I work with teams ranging from early-stage start-ups to corporate product development to do consumer research and product design. Agile is the way I help these teams accomplish more than they could ever imagine. Let's take a walk together and examine a few misconceptions of agile and how the right frame of mind can create an environment of unprecedented value delivery.

Cutting through the agile buzz starts with understanding what agile is. It's a mind-set, not a tool set. It's a very intentional way of looking at the work at hand. Well-intentioned misperceptions of agile paint it as a path to working faster and getting more done, all in a two-week sprint. While there are kernels of truth in these ideas, in practice they will fail to deliver the intended value without the right mind-set – just as tactics fail to deliver business results in the absence of strategy.

Other misunderstandings linger as well. Agile is sometimes seen as lacking a “plan.” Agile “plans” focus on value delivery outcomes instead of specific outputs. As a result, leaders who are accountable for product outputs may resist agile work and its agnosticism of how that value is delivered. Without a clear road map to a static output, leaders are often uneasy about the ambiguity of agile work.

Managers concerned about the lack of a plan can also become uncomfortable about losing control of the team's work. This is, in fact, one of the advantages of agile work. Traditional management control of work often takes the form of directing teams to a specific output. Unfortunately, the manager is often too far from the customer to have the right perspective to be responsive to their needs. Agile teams give managers the opportunity to mentor their teams in a fundamentally different way, by supporting customer-centric work that drives real value, regardless of the ultimate



form that the output takes.

A belief that agile is only effective in the software development space is the most common misconception. It's true that agile started in the IT boom of the 1990s but savvy companies have used the mental discipline of agile to build value in areas other than IT for just as long, with great results.

One of those areas is market research. You may not currently think this way but I challenge you to consider the following: your market research work is a product. You heard me right. A product is "something that is manufactured for sale." Market research easily fits that definition. Your team manufactures it and sells it to someone who uses it as a tool to drive some value proposition in their world. Your research fuels product design, marketing and even product retirement. With that in mind, when your internal customer approaches your team and says, "I need to understand X, so that I can achieve Y," why wouldn't you design and build your research product in a way that maximizes that customer outcome and at the same time minimizes the work required to build it?

Once you have answered the initial question of "Should I build this?" an agile mind-set asks, "How do I know that I'm working on something that my customer will value?" and then, "How do I build the right thing well?" Understanding where the two forms of waste occur in your design-and-build process will help you optimize your work. First, building the wrong thing is a tremendous waste of time and effort. It happens when there's a disconnect between the definition of value between producer and consumer. Second, overbuilding the right thing is just as devastating. Like overshooting a target with a well-intentioned arrow aimed too high, your customer watches it fly by and is forced to waste time in retrieving it.

Pays big dividends

When we have a solid foundation in those agile mind-set questions, our tactics begin to take shape in support of that mind-set. Spending time in the

"how" of our work pays big dividends in building the right thing, in the right amount, quickly. Three universal concepts drive the "how."

The first is cadence; the pace at which we work. An agile team uses time-boxing to do several important things in one-to-two-week "sprints." Sprinting doesn't speed up the work, it focuses it. The sprint gives us a deadline to deliver something of value to our customer for feedback. In so doing, it forces us to build smaller outputs that still deliver enough value to get that customer feedback that will help define our next step. Sometimes the feedback helps us build more, sometimes it helps us to stop and build something else and, occasionally, the customer really surprises us and says, "This is great, I'll take it from here!" Sprints force us to build smaller, more often, with radical customer involvement; and it solves for overbuilding and building the wrong thing.

Second is communication. The agile mind-set compels us to practice highly intentional communication with the outcome of ensuring the team's work matches the customer's outcomes of value and timing. Great agile teams are able to focus on speed-to-value by employing a sponsor, sometimes referred to as a product owner in agile circles. This person is usually in a leadership position, like a manager or director, and has upward leadership access to communicate on the team's behalf, advocate for necessary resources and shield the team from unproductive distractions that can come from high places, keeping scope clearly defined. This helps the team concentrate on their customer and their customer's outcomes, while keeping keen focus on maintaining the right fidelity of the solution they're building. Great sponsors ask their teams lots of questions, both to help understand their needs and also to challenge the team to keep that focus on the most valuable work.

Commitment is the third way teams drive the "how." Commitment is different from compromise or consensus. It's the ability of the team to translate ambiguity into action instead of paralysis. While there may be different ideas of how to drive value within the team, the team can com-

mit to a single direction to explore until customer feedback suggests otherwise. Teams great at commitment have more outputs, more often, for more customer feedback. In this production of more, these teams paradoxically complete their work using fewer resources.

Supporting all three of these concepts are a few more commonly used tactics.

- Backlogs help identify potential future work to be done. The sponsor works with the team to establish the backlog and maintain its prioritization as the team ingests customer feedback. Backlog items are scrutinized for size and broken down to the smallest value chunks that can be completed in a single sprint for customer inspection. These small chunks become the work pulled into future sprints.
- Stand-ups or scrums are five-to-15-minute team huddles held two to five times per week that give team members a chance to share anything that might impact the team's ability to deliver the value they've committed to for the current sprint. Not an update meeting but a forum to call out risks, identify barriers and request help or additional resources needed to keep the work moving.

Not an update meeting but a forum to call out risks, identify barriers and request help or additional resources needed to keep the work moving.

- Demos are the formal feedback sessions where team and customer evaluate sprint work for value and appropriateness of fidelity. Instead of perfection, "good enough" is the target metric. Great teams are judged by the work they don't do, just like jazz aficionados listen for the notes the musicians aren't playing.
- Retrospectives or "retros" are the tool great teams use to look inwardly, to identify opportunities to work better. Being intentional about all of the "hows" helps teams own their processes and builds a culture of constant improvement. Sponsors contribute by helping hold teams to these new commitments and resourcing as needed to support new goals.

Room to experiment

Starting an agile journey can be difficult but begins with a single step. Permission can be that first step. Getting

someone in a leadership role to give you room to experiment is key. Top-down thinking and antiquated ideas of failure can doom agile work before it begins, so get agreement on a short-term test with a low-risk project and a small team. Coach your benefactor to mentor your team as a sponsor and spend time reflecting on what the sponsor is observing. Challenge the sponsor to inquire more and advocate less. Measure team results when they are allowed to focus on customer outcomes.

Most importantly, get help. A scrum master in your company can be a place to start. Or reach out to me. I'm passionate about helping people live better lives through agile work. I won't ask you for any money; helping others solve their agile problems helps me get better at what I do. You can find me on LinkedIn at [linkedin.com/in/bill-murray-mentor](https://www.linkedin.com/in/bill-murray-mentor). Starting with the right footing can help you get the traction you need to keep your agile transformation moving in the right direction. 📌

Bill Murray is a startup mentor/innovation catalyst with American Family Insurance. He can be reached at wmurray@amfam.com.

● ● ●

**It's not an Ad.
It's an Opportunity.**

www.globalsurvey.gs
sales@globalsurvey.gs

Reach your Audience with..

globalsurvey

What can we do for you?

and much more...

Mumbai | Delhi | Bangalore | Ahmedabad | Florida | London



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.

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



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



MREF

Marketing Research
Education Foundation

●●● health care research

Better for everyone

Philips Healthcare put human experiences at the heart of research into cardiology care pathways

| By Amy Pratt and Laura Hunt



snapshot

Multi-stakeholder, multi-market study sought to improve outcomes and improve lives.

The way in which health and health outcomes are experienced and defined is evolving. We are all very much aware of how the global pandemic is accelerating transformation within health care, subsequently impacting the design, accessibility and experience of care systems. To successfully engage with this changing landscape, we need an enhanced, holistic approach to insight development. While changes are happening at a system and regulatory level, the importance of the human or lived experiences of health care remains paramount.

In this article, we will share some of our recent learnings around motivating and inspiring a more holistic approach to exploring and understanding changing experiences within evolving health care systems. We will consider the importance of context, outline our approach to designing a truly human-centric piece of research and highlight how we used this to transform our research into impactful insights across the Philips Healthcare business. Our ultimate goal was to improve the human experience of a specific area of health care, reducing societal, financial and emotional impacts.

Making a positive difference

In the U.S., almost 50% of all the post-acute cardiac patients will be readmitted to the hospital within the first year, costing more than \$20 billion to the health care system. This is huge. And in a world which is increasingly focusing on sustainability as a holistic concept – better for people, better for planet, better for me – we have an opportunity to help improve this situation in health care, thereby making a positive difference to people's lives and helpfully contributing to society by reducing health inequalities.

Our insight agenda was very focused on health care outcomes. This concentration allowed us to create a truly holistic, insight-led approach to consider how to improve the quality of experience within a particular



part of the patient pathway in cardiology. Our aim was to understand how newly developed solutions can potentially go some way to alleviate health care costs at an individual and collective level.

We designed a multi-stakeholder, multi-market study to achieve our research and business objectives. Care pathway models have traditionally focused on linear, physical stages of care, with an emphasis on diagnosis and procedures. Our experience has shown that experiences of the patient pathway and health outcomes are multifaceted and that lived experiences are influenced by psychological and emotional factors, as well as the environmental context. Therefore, to fully embrace a truly holistic perspective, we opted for a style that embraced the complexities of subjective experiences, navigated tensions between patients, caregivers and professionals, while importantly leaning into the difficult experiences people can face when engaging with health care. We put the human lens at the heart of the matter.

Disrupted existing thinking

We are very alive to the importance of exploring consumer realities within lived environments. How can we claim to understand human patterns or behavior and experiences without acknowledging the natural contexts in which these are defined and performed? As a result, we needed to design an approach that disrupted existing thinking about patient pathways and health outcomes. An approach that connected with human experience, focusing on empathy, so that we could curate a consumer-intuitive discourse within the organization. We wanted to put humans at the center of our research program so that human experience could become the focus of the solution to therefore increase relevance.

The research program we designed allowed us to connect with human experiences through a qualitative research methodology. This comprised a blended approach of qualitative tools, allowing us to explore journey-

mapping while also evaluating potential solutions from various human perspectives: patient, caregiver and health care professional. It was important to us to design a research program that also extended across geographical boundaries and was reflective of patterns of behavior changes accelerated by the global pandemic. We believe our approach allowed us to grasp a better understanding of the contextual framework in which subjective behavior and identities are formed.

Furthermore, designing a human-centric approach meant we could sensitively explore in-the-moment thoughts. The frequent reliance on post-rationalization was not enough to create the quality of insights needed to create usable and impactful sustainable solutions for this part of the patient pathway. Through considerate moderation, we connected with humans during particularly challenging times in their lives and we are very grateful for them sharing these experiences with us as part of our research program.

This approach was not without challenges. As with any insight-led approach, we needed to talk to the right types of people, delving into experiences while in the moment – a deeply personal moment that was difficult to rationally define, yet alone capture. This required creative thinking to identify ways to connect with the right people at the right time, overcoming time zones and market-specific frameworks. We like a challenge and so extended these tactics to reach out to caregivers and health care professionals. By working collaboratively, we were able to share ideas and successfully overcome such challenges – we were better together.

Guiding principles

Irrespective of the area of health or well-being that you are focusing on, we believe there are some shared guiding principles which can optimize the impact of insights generated through primary research.

- Move beyond the traditional combination of research agency and insights team to cross-

cluster collaboration across the business – and at all levels, if possible. The needs and desires of your R&D colleagues are critical, as is input from commercial and gaining buy-in from senior executives to help land the insights within the business. Not only is this critical at the start of a research program but communicating with such colleagues only increases in importance throughout the project lifecycle. Our project demonstrated, and delivered, the potential benefits of sharing collaboratively and showed that it is possible to overcome perceived barriers of working in this way.

- When setting out on insight discovery, start with the context. This means acknowledging how new trends are forming, how this process is shaped by cultural nuance and what opportunities this can create in the future. Creating a collective understanding of this environment across your business can help shape future agendas and create support for the role of holistic research approaches early in the journey.
- Expanding the target audience of a project scope allows space to create a holistic approach, an ecosystem of insights that puts the human experience at the heart of the matter. We would argue that such an approach can inform strategic decision mak-

ing more reliably than a linear approach could.

- As with all research, carefully select the research tools and the moderators executing those tools. Activating appropriate techniques for the types of research participants is beneficial for any research project but moving beyond this to capture in-the-moment observations at such a crucial point in the patient pathway requires a particularly sensitive mind-set and awareness.
- Encouraging the right kind of culture across the project team can make or break the success of this kind of research program. Fostering openness and creating an authentic dialogue and collaboration across the research team is pivotal. It improves the working partnership and can drive the quality of insights and enhance the commerciality of the subsequent recommendations.
- Designing and developing solutions that are human-centric is exciting! Taking a holistic approach can broaden the scope for opportunity spaces and engaging with wider stakeholders early in the process allows greater relevance for quality of life and improving health outcomes.
- Don't underestimate the wider significance of your research or

the potential impact you can have on helping shape experiences and policy moving forward. In an ever-changing world that is increasingly focusing on health, shaping new experiences and responding to evolving human needs, we can all play a role in enhancing quality of care and policy debates.

Disrupted our thinking

This is only a very small selection of the learnings we have been gathering at a global level through this multi-stakeholder and multicultural insight program. This piece highlights how the insight-led collaborative relationship between Philips Healthcare and InSites Consulting has successfully disrupted our thinking to move beyond the functional context or surface level to embrace lived experiences against the backdrop of changing societal trends in a pandemic world. These experiences continue to inform our approach to insight development to ensure impactful research projects, while also adding to evolving debates about the design of health care research and wider policy considerations about the role of health care systems.

As demonstrated here, we believe in a holistic approach: a non-linear style; understanding the issue from various viewpoints; and a practical yet emotional emphasis. The human experience embedded in the moment and familial perspective remain key, as do wider perspectives and opinions of payers, regulators and of course health care professionals. It is our goal to inspire the design of health care research and the impact this can have on portfolio development, the design and accessibility of solutions and, ultimately, human experiences. 🗣️

Amy Pratt is senior MI&A manager – consumer health lead, group marketing and e-commerce at Royal Philips. Laura Hunt is business director, health and wellbeing at research firm InSites Consulting. She can be reached at laura.hunt@insites-consulting.com.

There's a lot on the line.



Telepoll 
MARKET RESEARCH



TELEPHONE DATA COLLECTION

CATI • B2B/B2C • LOW INCIDENCE • ONLINE RESCUE

1.800.743.6443 • telepoll.net





**Marketing research information
when and where you want it.**

QUIRK'S
M E D I A

In Print • Online • E-Newsletters • Blogs • News
Webinars • Shows • Mobile • Social Media

www.quirks.com

••• the business of research

Fairer and better

Improving how we measure basic demographics

|By Jon Puleston



snapshot

Jon Puleston draws from global research-on-research to demonstrate the value of rethinking approaches to asking about income, age, employment, etc.

Demographic questions like age, gender and income are the bedrock of market research. We rely on them to target audiences, set quotas, purchase sample and ensure our research is representative. They are, in effect, a trading currency for the market research industry.

Yet there are no standards for how we measure them, with methods varying between market research companies and between countries. Anyone mixing sample from different sources can rarely be confident of getting a comparable spread. This also makes it difficult to reliably compare data between surveys.

Perhaps worse still, the lack of standards leaves us with no way to assess the accuracy of data. Over the last few years, I have studied the inherent biases in data by exploring the gap between survey answers and what we know from elsewhere. Sadly, some of the largest gaps can be observed in basic demographic questions.

This has been an elephant in the room of market research for several decades. It might represent one of the biggest inefficiencies holding back our industry.

A number of past attempts have been made to tackle this issue. They have failed for various reasons. Agreeing on global standards requires a heavy effort of coordination and funding. Many national methods of measuring demographics are firmly entrenched. Motivation has also perhaps been lacking, due to the relatively small proportion of cross-market compared to single-market research.

So what has changed? Why now? Marketing has become an international business with a greater volume of cross-market research and this has increased demand for standards. The harmonizing of sampling technology, along with automated sample supply, relies on consistent demographic standards to ensure efficient trading of sample.

Society is also changing. There is demand to improve the inclusivity of our research, to show that we can reach audiences from all walks of



Big gaps

The main challenge we face with demographic questions is getting realistic answers. Often there are big gaps between reported answers and what our wider knowledge leads us to expect (Figure 1). There are various reasons for this. Respondents might be embarrassed at revealing their age or lack of education, or might exaggerate earnings, or might simply find an answer hard to work out. And as we have discovered, these issues are exacerbated by how we ask the questions.

One of our initial realizations was just how biased, non-inclusive, hierarchical or patriarchal question wording can be. We ask, “What is your highest level of education?” implying that high is better than low. We ask, “Are you male or female?” which, unlike almost all other questions, has the options in a fixed order, male first. We ask about someone’s “working status,” assuming that everyone works, and associating “status” with “work.” The list below shows a great example of the standard question used in the U.K. to measure social class.

Please indicate what best describes your profession:

- High managerial, administrative or professional
- Intermediate managerial, administrative or professional
- Supervisor, clerical, junior management, administrative or professional
- Skilled manual worker
- Semi-skilled or unskilled manual worker
- Self-employed
- Housewife/househusband
- Unemployed
- Student
- Retired or on state pension

The language is archaic – who wants to tick a box saying they are unskilled? The use of “profession” assumes that a job is a vocation, while the first word on the list – “high” again – has status built in. Those who don’t work can only be described here as “unemployed” or “housewife,” both of which could be viewed as demeaning. As a result, the answers to this question prove to be highly distorted, with a disproportionate number selecting the top choices.

life and to demonstrate we’re measuring who we say we are.

Another barrier to establishing standards is the lack of convincing research-on-research evidence pointing us towards a solution. How should we best ask some of these demographic questions?

Over the past two years, my team at Kantar Profiles has conducted extensive research-on-research to find better ways of measuring basic demographics, with the goal of establishing best practice. We conducted over 50 comparative experiments in 15 different countries and carried out a large-scale evaluation and audit of global methods for measuring demographics and social class. Cross-evaluation experiments compared the efficacy of the main existing methodologies, alongside newer techniques we think might be more reliable.

In this article, I’ll present some of the learnings from this research, together with a view on the way forward, which I hope will prompt a fresh initiative in establishing global standards.

Figure 1

Studying how we measure demographics...

There are often big gaps between the answers people give to basic demographic questions we ask and what is expected.

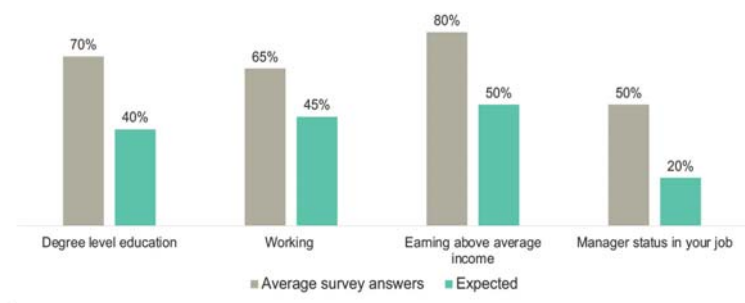


Figure 2

Education level

Current vs. new method

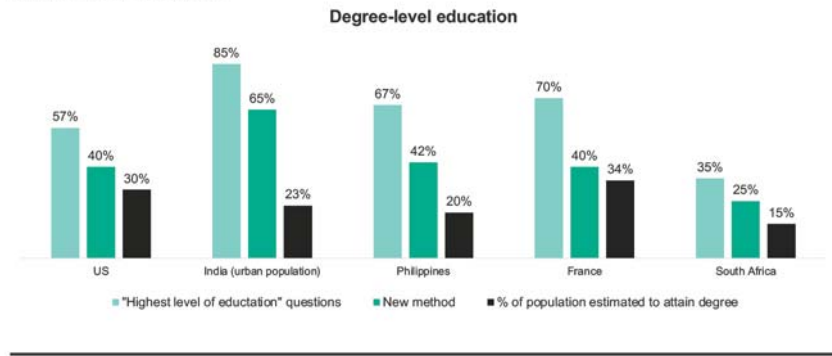


Figure 3

Working status measurement

How this question is typically asked:

What is your working status?

- Working full time
- Working part time
- Self employed
- Unemployed
- Housewife
- In education/still studying
- Retired
- Other

Another big issue we see are measures that quickly go out of date, such as income brackets that haven't been adjusted to reflect inflation. Another example, used in many countries, attempts to determine disposable income by asking about household items of value. These lists can often be decades old and therefore meaningless as a predictor of wealth.

Some questions are simply difficult for people to answer. Someone working day-to-day might not know how to calculate their annual earnings, for example. We also see confusion between pre- and post-tax income, with most knowing the first much better than the second.

One of the biggest challenges, particularly for online research, is the length of lists. When asking a person's occupation, a full list of options can fill six screens, making it difficult to find a particular job, especially when many can be described in multiple ways. Even so, with the multitude of different jobs in existence, these lists are often incomplete. (As a

market researcher, you may well have encountered this challenge yourself – "Should I put 'marketing' or 'data analytics'?")

So what are the solutions?

Think harder

The first step is to think harder about how we ask demographic questions and the choices we present.

Take the apparently simple challenge of asking people their age. Most researchers understand that it matters how age ranges are presented. It's usual to show them mid-decade to mid-decade (so 35-44, not 30-39), because while people tend to dread shifting up a decade, they're less sensitive about the transition from, say, 34 to 35. But one often-ignored psychological aspect is how non-inclusive it is to cap the age ranges at, say, 65+. This implies researchers don't care about anyone over retirement age. Consequently, we recommend that age bands go up to 95+. While few respondents will be that old, it helps make those in their 50s and 60s feel less

ancient – and more likely to honestly report their age.

Similarly, the question, "How old are you?" contains an implied judgement about aging. We recommend avoiding the word "old" in the question.

The most reliable method to assess someone's age is to avoid the direct question altogether and instead ask year of birth. Respondents seem to report this more honestly, perhaps because it's perceived as less judgemental or perhaps because it's less prone to accidental error. Some people may genuinely forget how old they are.

Measuring education

Claimed education level provides one of the highest observable discrepancies between online survey answers and country population demographics. Many more people claim in-survey to have a degree than is theoretically possible from our knowledge of published data. This is an endemic issue in every country measured, with upwards of 30% overclaim in degree+ education levels.

The reason for this, as highlighted earlier, is the way we ask the question, "What is your highest level of education?" With the implication that "high" is best, it's unsurprising that some people who don't have a degree click the box to say they do, especially given no one is likely to check. Nobody wants to come across as stupid, even to faceless market researchers.

Our proposed solution is to ask in a more roundabout way. We recommend firstly asking people what they did when they left school.

What did you do after leaving school?

- Looked for a job/started work
- Took up an apprenticeship (or job with training)
- Went on to do more education/training
- Pursued my own goals

By avoiding the apparent assumption that people go on to higher education, far fewer seem to feel the pressure to say they did so. Rather than, "What is your highest level of education?" we recommend asking what type of further education they undertook and whether they attained any qualifications from this.

Shifting the approach like this

Figure 4

Changing the question to de-emphasise work and expand out non-working roles

What best describes your lifestyle currently?

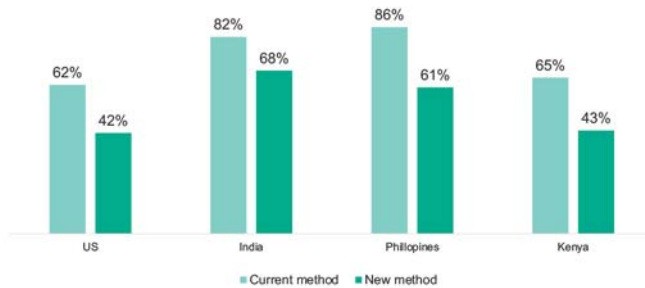
<input type="checkbox"/> Retired	<input type="checkbox"/> Bringing up family
<input type="checkbox"/> Studying / retraining / in education	<input type="checkbox"/> Full time carer
<input type="checkbox"/> Working	<input type="checkbox"/> Homemaker, Housewife, house husband
<input type="checkbox"/> Not working/ In between jobs	<input type="checkbox"/> Other
<input type="checkbox"/> Pursuing own goals e.g. travelling, a creative pursuit, buying/selling things online	

full range of “housewife”-type roles (Figure 4). We suggest adding a tip to explain what “pursuing own goals” might be, to help make this feel a legitimate and respected choice. We also recommend making this question multi-choice, as people may well be doing more than one.

With this change of approach, every country we tested showed significant drops in the number of people feeling the need to claim to be working (Figure 5).

Figure 5

Claim to be working Current vs. new method



Note: These experiments did not use not fully matched samples so this is anecdotal evidence for time being

Measuring employment

Finding out what people do for a living is the most complicated demographic to measure in-survey. Job lists can stretch to hundreds of choices, with many unique jobs almost impossible to group and classify. People think about and describe their jobs in many different ways, some identifying themselves by industry (“I work in banking”), some by role (“I work in HR”), others by status (“I am a director”).

As part of this research, we asked 500 people in five different countries to describe their job and then try to find it on our standardized list of about 200 occupations. One in five people said they could not find theirs. Of those who did, less than half directly matched their own job description.

Many of their jobs simply were not on the list. Jobs and their definitions are evolving all the time – social media, for example, has spawned a whole range that didn’t exist a decade ago and these were missing from the list we tested. What with the number of different lists used by researchers around the world, I think everyone in the industry could benefit from one that is standardized, optimized and kept up-to-date.

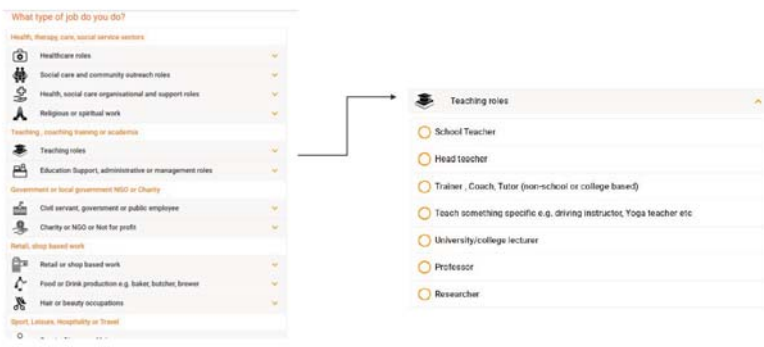
Our solution would be to use a more effectively grouped job list with drop-down choices. The first is a broad set of industry categories, within each of which is a clear set of sub-industry categories, with icons to help identify them. See example in Figure 6.

Once a person selects the broad industry category, they are presented with the third tier, a drop-down list of specific jobs, such as the “teaching roles” section of Figure 6. There is also room in this methodology to ask

Figure 6

Job status measurement

Devising a more sophisticated job definition list that works effectively in every part of the world



produced data far closer to best estimates of known education levels in every country we tested (Figure 2).

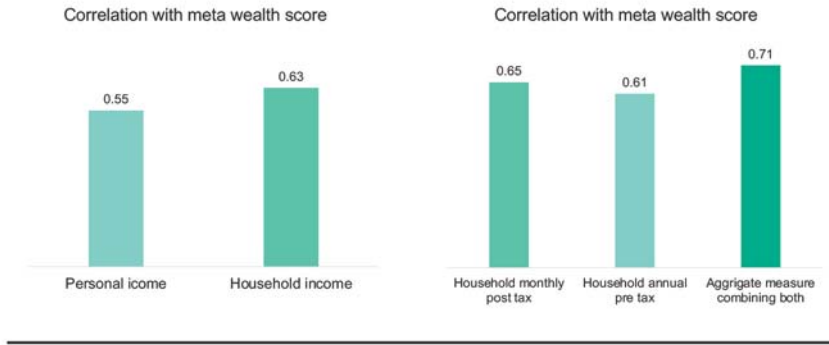
Working status is another common demographic question often asked in a non-inclusive way. The list of options for “What is your working status?” usually has “working” at the top (Figure 3), with non-working lifestyles reduced to a choice between “unemployed” or “housewife.” Many

non-working people would be unhappy identifying as either of these.

We recommend changing the question slightly to remove direct references to work and status and deemphasize work by placing it in among the other choices. We suggest expanding the non-working roles to include “bringing up family,” “full-time carer” and “pursuing own goals,” and taking care to include the

Figure 7

Income as a predictor of wealth and disposable income



points to the need for an industry group to do further research and create reliable job lists.

Measuring income

Income assessment is one of the most common demographic questions but probably the most unreliable of those we researched.

For those in regular full-time paid employment, assessing one's income is a relatively simple process. But for many people, it can be a challenge, such as those who work variable hours, are freelancers, have more than one source of income or who rely on benefits to top-up earnings. Our research estimates that only half of people appear able to reliably report their income.

Then there's how to measure it. If the industry were to standardize one demographic measure, I'd beg for it to be income. At present, most researchers ask this question with a seemingly random set of income bands that are often badly out of date and there are so many different ways of asking: annual income, monthly, pre-tax, post-tax. Some ask about personal income, some about household and some about head of household.

It would be so useful if we could all agree on not only standardized measures country to country but also a cross-classification protocol that divides each country's income earners into percentile groups. Our industry would also benefit from a process whereby income bands are reviewed and updated yearly.

Taking the various ways of measuring income and comparing each with a broader assessment of a person's disposable wealth, we found that asking for monthly income, after tax and deductions and for the household, is more reliable than annual, pre-tax or personal income (Figure 7).

However, we found that because of the difficulty people have in answering this question, the most reliable approach was to ask both monthly post-tax and annual pre-tax income and combine the scores.

Part of the reason income does not correlate more closely with measures of meta-wealth is that it's subject to high levels of overclaim. Our basic so-

Figure 8

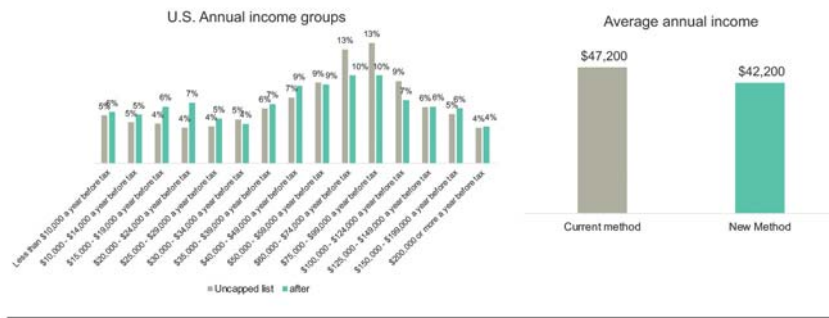
Income: Proposed new method to reduce overclaim



Figure 9

Claimed annual income (U.S.)

Current vs. new method



about job status where relevant. For further detail, we also recommend asking follow-on questions about the number of people the respondent manages, worded in an inclusive way.

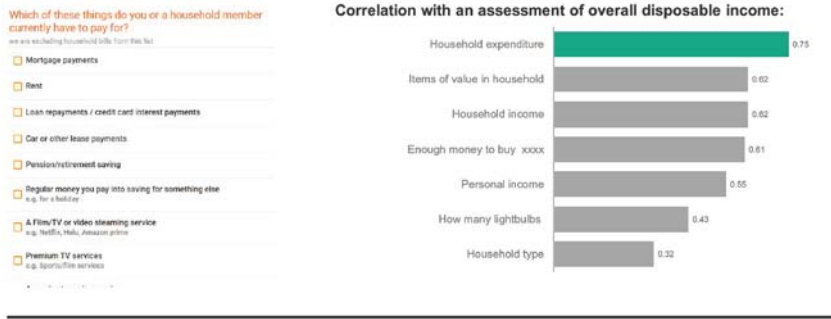
And, recognizing that many people now have more than one job, we recommend asking respondents whether they have a second job, and if so, what it is.

We carried out several waves of multi-country research to try to perfect the list of jobs we present to

people but we aren't quite there yet. One list achieved a 95% correct job attribution in the U.S. and U.K., but when tested in four other English-speaking countries around the world (Singapore, Philippines, India, South Africa), this fell to 82%. Further, when translated into Portuguese and tested in Brazil, it fell to 77%. This highlights the combined challenge presented by unique jobs in specific countries and unique job descriptions in specific languages and

Figure 10

Discovered the expenditure assessment is potentially more reliable socioeconomic measurement technique



income. But again, this question suffers from overclaim, and is highly reliant on having a well-curated and current list of items.

Overall, our research found that the most effective assessments of wealth focused not on income but on a person's expenditure. Asking what people pay for seems to promote greater honesty than with ownership-based questions. Far fewer people are untruthful about having to pay for car insurance than about owning a car.

This expenditure-based method beat all other examined techniques as a means of predicting meta-wealth scores, with the answers correlating at 0.75 (Figure 10).

Great opportunity

Our industry has a great opportunity to improve how we measure basic demographics by making simple refinements to how we ask these questions and thinking differently about what we measure. The recommendations made in this article may not be the exact solutions but I hope this work helps point the industry in the right direction.

I have written this article as a member of the ESOMAR Professional Standards Committee, who have agreed to set up a new committee to tackle this issue made up of representatives from all parts of the global research industry. The plan is to look for common ground and try and establish and endorse global standards where we can find consensus one question at a time. I am really hopeful that we can make some progress on harmonizing our industry's approach to measuring demographics moving forward.

I am grateful for the support of Quirk's on this initiative, in inviting me to publish this article. 🙏

Jon Puleston is VP innovation at Kantar Profiles. He can be reached at jon.puleston@kantar.com.

lution is to cap the displayed income bands at half the average median income (Figure 8). To those who earn more than half, we then present a second-tier list of higher income brackets. This helps people on lower incomes feel less far down the scale.

As you can see from a comparison in Figure 9, this reduces the number of people claiming to be in the higher income groups.

Measuring socioeconomic aspects

Socioeconomic measurement techniques have troubled researchers for decades. Devised in the 1950s, they have since slowly become outdated and archaic. Despite their flaws, however, we are largely stuck with them. They have become embedded in research ecosystems around the world, used as trading currencies for media and form the fabric of giant-scale social research programs.

But could we refine and improve them? The main challenge is that every country has its own methods of measurement, many highly idiosyncratic.

As part of this research, we undertook an audit of social class measurement in 44 countries around the world to identify unifying themes. No two countries use exactly the same method but we identified five thematic approaches, with each country using a different combination to arrive at an overall measure: income-based; education and job classification; house type and living circumstances; spending power; and items of value in household.

Each has its issues. The first two methods have been covered above.

The others are explored here.

Assessment of housing and living circumstances is used extensively across Latin America, Southeast Asia and parts of Africa. Questions are asked about the type of house and number of rooms, the type of roofing and flooring, whether or not there is an electricity supply or plumbed-in water, even how many lightbulbs there are. This does not translate well into the realm of online research, where taking a survey online relies on using a device that requires an electricity supply.

Assessing spending power is used extensively across formerly communist Eastern Europe and Russia. Respondents are asked how much of their household income they spend on food and what else they can afford to buy, such as new clothes, a large electrical item, a car or a house. This is quite a simple and effective technique, rivalling asking people their income. Like many other measures, it is subject to overclaim but a greater challenge is the difficulty in making it internationally comparative. What a typical person in a Western economy can afford to buy differs greatly from what one might afford in a developing economy.

Audit of items of value in household is a popular technique used in a number of countries, notably India and South Africa. People are presented with a curated list of items of value and asked which their household includes. This simple and adaptable technique is quite effective at predicting someone's wealth, on a par with asking household monthly



QUIRK'S EVENT

FOR MARKETING RESEARCH AND INSIGHTS PROFESSIONALS

TheQuirksEvent.com

CHICAGO
APRIL 11-12, 2022

LONDON
MAY 4-5, 2022

NEW YORK
JULY 20-21, 2022

VIRTUAL GLOBAL
OCTOBER 12-13, 2022

CHOOSE THE DATE AND LOCATION THAT WORKS FOR YOU

TheQuirksEvent.com

REGISTRATION COMING SOON!

YOU'LL BE IN GOOD COMPANY...

Below is a list of just some of the corporate brands that attend the Quirk's Event.



| 1st Source Bank | **3M** | 4S1 Health | 7 Tribesmen | Kroger | A+E Networks | **Abbott** | Abbvie | Aclaris Therapeutics | Advocate Aurora Health | AETN UK | Aetna, a CVS Health Company | Aflac | AIG | Alcon | Alligator | Allstate Insurance | Ally Financial | **Amazon** | American Academy of Dermatology | American City Business Journals | American College of Obstetricians and Gynecologists | American Diabetes Association | American Express | American Family Insurance | American Greetings | American Veterinary Medical Association | Amerifirst Home Mortgage | Amway | Anheuser-Busch InBev | Astellas Pharma Inc | AT&T | Avis Budget Group Inc | BabyCenter | **Barclays** | Barilla Pasta | Barnes & Noble | Bayer Consumer Health | BBC News | BCBSA | Beam Suntory | Bel Brands USA | Benjamin Moore & Co. | Best Buy | BIC | Bimbo Bakeries USA | Bleacher Report | Bloomberg | Blue Cross Blue Shield | BMO Harris | BNY Mellon | Bobit Business Media | Boise Paper | Booking.com | Briggs & Stratton | Brighthouse Financial | Bristol-Myers Squibb | **British American Tobacco** | British Gas | Brown and Bigelow | Brown-Forman | BT | Burt's Bees | Bustle Digital Group | BuzzFeed | Calvin Klein | Camelot Illinois | Campbell Soup | Canon | Capital One | Caravan and Motorhome Club | Cargill | Cargill Protein | Cars.com | Caterpillar Inc. | CBS Corporation | CDW | Charter Communications | Chase | Chemours | Chicago Bulls | Chubb | Church & Dwight | Cincinnati Children's Hospital Medical Center | Cincinnati Christian University | Citi | Clorox | Club Premier | CNH Industrial | **Coca Cola** | Coca Cola European Partners | Cold Blow Farm | **Colgate-Palmolive** | Columbia University | Combe Incorporated | Comcast | ComEd | Comedy Central, Paramount Network & TVLand | Con Edison | Conair Corporation | Concordia Publishing House | Constellation Brands Inc | Converse / Nike | Cotton Inc. | Coty Inc. | Country Financial | Country Music Association | Crayola | **Cuisinart** | CUNA Mutual Group | CVS Health | Daiichi Sankyo | Dairy Farmers of Wisconsin | Dairy Management Inc. | DAP Products | Deliveroo | Dell | Delta Faucet | Detroit Pistons | Diageo | Direct Energy | Discover Financial Services | Disney ABC | Distell | Dixon Carphone | Domino's Pizza | Dow Jones | Dublin Airport | **Dyson** | Eli Lilly & Co. | eMoney Advisor | Epson America | ESPN | **Estee Lauder Companies** | Eurostar | Expedia | Experian | Fabletics | fairlife | Fidelity International | Financial Times | First Rate Exchange Services | Fiskars Brands | Food And Drug Administration | Ford Motor | Fork Truck Traders | Formula 1 | FOX Networks Group | Fujifilm North America Corp. | Gap | **GE Healthcare** | GEICO | General Atlantic | General Mills | Georgia Pacific | Google | Gore | Great Lakes Cheese | Griffith Foods | GSK | Hanesbrands | Harley-Davidson | Harris Equipment Corporation | Harrods | Harry's | Hasbro | HBO | Health Care Service Corporation | Healthfirst | HealthPartners | Heathrow | H-E-B | **Henkel Corporation** | Herbalife Nutrition | Highways England | Hills Pet Nutrition | HM Land Registry | HNL Lab Medicine | HOP, Insect-based nutrition | **Hormel Foods Corporation** | Houghton Mifflin Harcourt | Houston Methodist | HSBC | Huge Inc | Humana | IBM Corporation | IDEXX Laboratories | Ingredion | Ingredion Incorporated | Inspire Brands | Institute of Food Technologists | International Flavors & Fragrances Inc. | International Foundation of Employee Benefit Plans | ITV | J. J. Keller & Associates | J. Walter Thompson Worldwide | Jackman Reinvents | Jaguar Land Rover | Jet Support Services Inc | **John Deere** | John Lewis | John West Foods | Johns Hopkins Health System | Johnson & Johnson | Johnsonville | JP Morgan Chase | Kaiser Permanente | Katz Media Group | Kellogg Company | Kent Pet Group | Kerry | Keurig Dr Pepper | Kia Motors America | **Kimberly-Clark Corp** | Kohler Co. | Kraft Heinz | L&G | L'Oréal | Land O'Lakes | Land O' Frost | Landor | LG Electronics | Liberty Mutual | Library Journal | Life Fitness | Lincoln | Little Caesars Pizza | Live Nation Entertainment | Live Nation UK | Lloyds Banking Group | Lloyd's Register | London Sport | Lush Cosmetics | Mallinckrodt Pharmaceuticals | Mars Wrigley Confectionery | Marks & Spencer | Marriott International | Mars Petcare | **MARS Wrigley Confectionery** | Marvin Windows and Doors | Mass Mutual | Mastercard | Materne NA | **McDonald's** | McGraw-Hill | McKee Foods Corporation | McKesson Medical-Surgical | **Merck** | MetLife | Microsoft | MillerCoors | Mind Genomics Associates | Ministry of Justice UK | Mission Foods | Molson Coors | Momenta | **Mondeléz International** | Morgan Stanley | Morningstar | Morton Salt | Motorola Solutions | National Association of Realtors | National Grid | National Pork Board | NatWest | Navy Pier | NBCUniversal | Nespresso | **Nestlé** | New York Life | Newell Brands | Newsday Media Group | Nordstrom | Northern Trust | Northstar New Jersey Lottery | Northwestern Mutual | Norton | **Novartis** | Novo Nordisk Inc | NPR | NYC & Company | Ocean Spray | Olive Garden | Oliver™ | Orange | Otter Products | Otto Brand Lab | Pella Corporation | Penn Mutual | Pepperidge Farm | Pepsi Lipton Joint Venture | PepsiCo | **PepsiCo International** | Pernod Ricard | Pfizer | Philips | Pinnacle Foods/Conagra | PLAY | Premier Foods | Primark Stores Limited | Procter & Gamble | Progressive Insurance | Prudential | Public Broadcasting Service (PBS) | Publix Super Markets | Radiological Society of North America | RB | Reckitt Benckiser | **Red Bull Europe** | **Red Bull North America** | Redbox | Reed Exhibitions | Regeneron | Revlon Inc. | Rich Products Corporation | Richmond Events | Ricola | Riot Games | Rise Against Hunger | Robert Bosch Tool Corporation | Rocco Forte Hotels | Rockwell Automation | Rotary International | Royal Bank of Scotland | Royal Mail | Rugby Football League | S&P Global | S.C. Johnson | Salesforce | **Samsung Electronics** | Sara Lee Frozen Bakery | Schwan's | Scripps National Spelling Bee | Seattle Children's | Second City Works | Sherwin-Williams | Shure Inc. | SiriusXM | **Sky** | Society of Actuaries | Southwest Airlines | Spacesaver Corp | Specialty Equipment Market Association (SEMA) | Sport England | Spotify | State Farm | Swedish Match | Sylvan Learning | Takasago International Corp. | Tampico Beverages | Target Australia | TDS Telecom | TechStyle Fashion Group | Terex | The Climate Corporation | The Hartford | **The Hershey Company** | The JM Smucker Co | The National Pork Board | The Nature's Bounty | The Southern Alberta Institute of Technology (SAIT) | The TJX Companies | The Wall Street Journal | TherapeuticsMD | Thomson Reuters | Thrivent Financial | Tillamook | TJX Europe Limited | **T-Mobile** | Travelers | Trunk Club | Trusted Media Brands | Turkcell | Twitter | Twitter UK | Tyson Foods | U.S. Cellular | Uber | UBS | UK Greetings | **Unilever** | United Concordia Dental | United Methodist Communications | UPS | V&V Supremo Foods | Verizon | VICE Media | Viking Cruises | Virgin Media | Virginia Lottery | Vistaprint | Voya Financial | W.W. Grainger | Walgreens | Wendy's | Westfield | **Whirlpool** | Wizz Air Hungary | Worldpay | WWE Corp | Wyndham Hotels & Resorts | Xcel Energy | Yahoo | Zappos | Zillow |

THE QUIRK'S EVENT

THANK YOU TO OUR SPONSORS

LEGACY SPONSOR



TITANIUM SPONSOR



GOLD SPONSORS



SILVER SPONSORS



BRONZE SPONSORS



ADDITIONAL SPONSORS



TheQuirksEvent.com

TICKET PRICES START AT
\$149*/£99*

*Corporate researchers only. Other packages available.

EXHIBITORS



CUTTING EDGE SESSIONS, INNOVATIVE EXHIBITORS AND GREAT NETWORKING—
 AT A PRICE YOU CAN AFFORD!



••• data analysis

Going one better

Adding budget considerations into choice-based conjoint

| By Steve Cohen



snapshot

Steve Cohen looks at the value of assessing the many constraining factors that can affect consumer purchases.

For many of us, daily life has changed beyond all expectation during the pandemic. Consumers are finding that they need to reassess their spending in response to changes in personal circumstances and the rising cost of goods. There's greater focus on the way we budget and get the most for our money. By necessity, we make trade-offs that drive our buying behavior in a search for greater value.

Of course, it's not just price that affects what we purchase. Many factors influence consumer behavior and the way we budget. As researchers, how can we help our clients optimize the value that a consumer places on a product or service? How do we help steer their innovation and product strategies so that they can prioritize the features and options offered in products and price them accordingly?

There are tried-and-true research methodologies that have enabled analysts to yield highly impactful results for years. But one size does not fit all. There are new tools and technologies that improve upon standard choice models and if we aren't leveraging the new tools to our advantage, if we aren't building on existing tools with new thinking, are we not missing the opportunity to do better? To know more? To create greater value for our customers and our companies?

Go through some mental math

To start with, let's consider how people make decisions. If you gave someone three or four different purchase options, with varied features and prices, we could assume they would go through some mental math to evaluate each of the choice alternatives. As noted above, we're expecting them to make trade-offs between the benefits that the features offer and the price that must be paid. Marketing scientists use this principle to work out what the most probable choice would be for each item in a set of alternatives.

Choice models have been a very important tool in market research for



the past 40 years. I built my reputation on the use of choice-based conjoint (CBC) and I am proud that my pioneering work on CBC, including introducing MaxDiff and menu-based conjoint, has been recognized by the American Marketing Association, the Institute of Management Science and the Market Research Council as being worthy of lifetime achievement awards.

Too often we see CBC deployed at a very basic level by less-savvy practitioners using software tools that enable programming of complex studies with only the most simplistic understanding of the assumptions and math of the analytic tools and how to interpret the results in a reliable, predictive way. I caution against relying on an analyst whose only training in CBC was to “read the manual.”

For those unfamiliar with CBC, at its most basic level respondents express their preferences by choosing a product from a set of alternatives, rather than by rating or ranking them.

We identify how respondents value different features by asking them to compare several options and to select the one that they prefer most. These product profiles are generally limited to sets of a few alternatives, so as to not overwhelm or confuse respondents with a larger number of options.

In essence, we’re asking people to choose a product by comparing – or trading off – the features and benefits of a small range of products that are relative substitutes for each other. More on this in a moment.

By exposing enough of the product options to a large enough sample of people, we can apply complex math to reveal an optimal path for product development and pricing strategies that a brand should pursue.

Simple in theory

The standard multinomial logit (MNL) model at the core of choice modelling is simple in theory but the math behind it is a bit complicated if you’re not a data scientist. Let’s examine this equation.

$$Pr(i \in S) = \frac{\exp(\beta_i X_i - \beta_p p_i)}{\sum_{j=1}^J \exp(\beta_j X_j - \beta_p p_j)}$$

This is the formula used in the standard multinomial logit model, the workhorse model of choice. To put it in words, the probability (Pr) of choosing item *i* from set of items *S* is equal to the result of a fraction. B_i is the weight that is placed on the product features X_i . We assume that the features offer benefits to the chooser and each feature has its own positive weight or importance (B_i).

Counterbalancing the feature’s benefits is the disutility or price penalty that must be paid to gain those benefits, shown as $B_p P_i$. To complete the fraction, two additional operations must be executed.

In the numerator of the fraction, we calculate the benefits minus the disutility, as shown in parentheses, and then it is exponentiated as $\exp()$. We perform the same calculation for all items in set *S*, subtracting the disutility from the benefits, exponentiating each of these and then taking their sum.

In short, multinomial logit is a share of preference model that tells us, for each person and for each item in the set, how they would allocate their “choice shares” across the alternatives that they can pick from.

In practice we’re putting a value to the trade-offs between something a consumer really likes, such as more features or better performance, and the price they are prepared to pay.

Has its limits

The standard multinomial logit model (MNL) has its limits. For starters, people only choose one thing from a small set of choice alternatives. This provides the analyst with some basic information but it’s not enough to generate stable results for each person. To get more stable results, we must ask repeated questions in CBC so that we see how people respond under different offerings and conditions. This gives us more

information from each person and is more likely to get good results.

As stated earlier, a major assumption behind CBC is that the offerings shown are relative substitutes for one another. This works well when the choice alternatives are similarly featured and similarly priced. However, in some situations we may want to compare choice alternatives that differ greatly by price or other factors. For example, the prices of different iPhones are very different, with more expensive phones being two or three times the price of less expensive phones. Similarly, many CPG products come in different sizes. A large container of laundry detergent may cost three to four times as much as the small size.

If you wish to investigate the choice between two different sizes, how should price be treated in an analytic model? Let's say that a six-pack of beer costs \$10 and a 30-pack costs \$25. If we ask beer buyers which they would choose and we use the actual prices, then, all else equal, people should choose the six-pack because \$10 is less than \$25. However, if we were to show the cost per liquid volume, then the 30-pack is a better choice because its cost per volume is less than the six-pack.

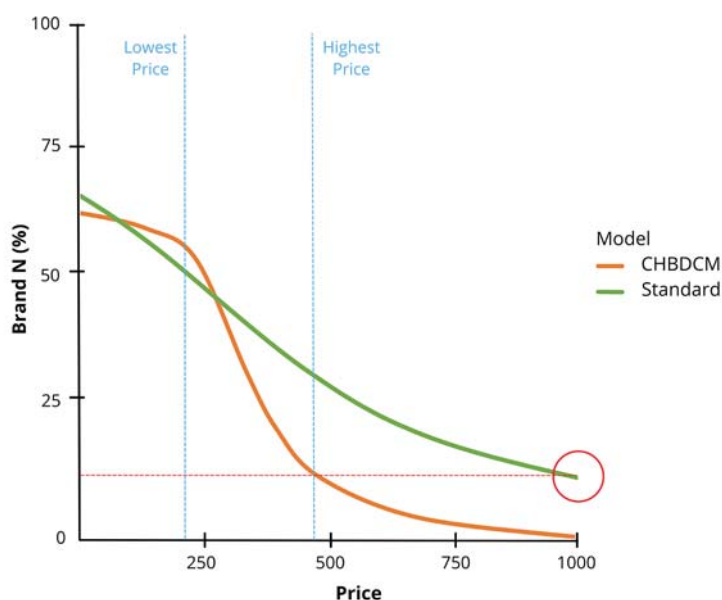
But what if the buyer doesn't have \$25 to spend on beer or didn't want to spend \$25 because it's beyond their budget? Now we're in a situation that standard MNL cannot handle. It can't understand or quantify the fact that the buyer is constrained because they're unable or unwilling to spend \$25 for the case. So why are people not buying the \$25 case? Is it that they don't want to spend that much money or that they don't want that much beer? Perhaps they don't have enough room to store a case of beer or can't carry it home. It's impossible to tell with standard tools.

In other words, the budget is one of several constraints on purchasing that is not considered in choice modeling – that is, until now.

Make it more effective

If we are going to take the standard multinomial logit model and make it more effective in choice modelling, what exactly does it mean to incorpo-

Figure 1



rate constraints like a budget into the equation? Why is that important?

At a basic level, we look at our income and expenditures and we apportion what we have accordingly to cover our living costs. But a money budget is just one of many constraints that have an impact on what we buy. Other constraints include product availability, the time it takes to purchase and receive an item, whether I'd pay to ship a product that is heavy versus carry it home from the store, how much storage space I have for buying bulk-priced options (as in our example above), the calories, sugar or gluten content and if it is a novel or a repeating purchase.

In short, people make choices under constraints. This is a fundamental tenet of human behavior.

A budget can be impacted by more than strictly the consumer's available discretionary income. As behavioral economics instructs us, the occasion or context can also influence a purchase. Picking up a quick-service dinner for the family on a work night may include a budget consideration. Buying the food and beverages for your eight-year-old's birthday party introduces a budget consideration that is totally different.

As shown above, the traditional MNL model investigates the trade-off between benefits and price and quantifies the extent of price sensitivity. The downside of this approach is that, even if you were to raise the price of a product to astronomical levels, this

standard approach predicts that someone, even if it's a very small percent of people, will still purchase this very expensive item. A very unlikely event indeed.

In contrast, a new CBC approach estimates an individual-specific constraint, in this case a money budget. This constraint assumes that each person has a fixed budget for their purchases. If a purchase option costs more than their budget, the consumer will just not buy the product. Each person's budget is estimated through some statistical magic and is part of the modeling output.

With each person's budget in place, the price-demand curve is much steeper because when each person's budget is surpassed, they drop out of the market. The graph in Figure 1 illustrates this.

It is taken from a prior analysis that we did concerning the purchase of digital cameras. The range of prices shown to consumers went from \$199 (lowest price) to \$499 (highest price). The green line represents the price-demand relationship that the standard MNL model produced. The orange line is the equivalent relationship from a constrained hierarchical Bayesian discrete choice model (CHBDCM).

In this graph, note that, as the price of Brand N increases (shown on the x-axis), the standard MNL model has a nice, smooth-sloping line of choice shares, while the budget model is much steeper. Essentially, we see

that people are likely to drop out of the market as the price is increased and their budget limit is exceeded.

To show more dramatically what happens when the budget is exceeded, at the highest price tested, the standard MNL model predicts 2.5x the share of choices (about 26%) than does the budget model (about 10%).

Further, note the location of the lines in the lower-right portion of the graph at a price of \$1,000, which is double the highest price tested. The standard MNL still predicts that about 10% of people will buy at that high price, while the budget model predicts no one (0%) will do so.

In short, the budget choice model yields more plausible price-demand relationships than does standard MNL, which will typically suggest higher prices than are likely to be accepted by consumers.

Our work with the new budget-constrained choice model has been exciting. CHBDCM can provide a superior fit to the raw choice data compared to results from a standard MNL choice model. It has lower estimation error. It also identifies which people have lower and higher budgets and higher and lower price sensitivity.

Too large

Over the years, skilled analysts have noticed that standard MNL produces estimates of price sensitivity that are too large. The budget-constrained choice model produces price sensitivity estimates that are smaller (less negative) than MNL and less variable than MNL.

This concept of “budget” brings real benefit in the new world that we’re in. This is particularly useful for certain fast-moving consumer goods or more expensive items that we typically budget for – liquor, durables and luxury goods, etc. It can reveal more realistic variations across people and budgets.


The budget model enables us to do something that the standard multinomial logit model cannot. In the hands of skilled partners who understand the math and science, it can uncover constraints on purchasing, including a money budget, in all its beautiful complexity, from the sole criteria of price sensitivity, giving us more sophisticated insight into the why behind the what as well as the how.

Factors beyond price

By adding in the consideration of the budget in CBC, you get more than just price sensitivity. You get insight into

the power of the brand and factors beyond price that influence what consumers are more likely to buy. Done right, you can even identify new microsegments to which you can advertise your products and build new streams of revenue.

Newer discrete choice models are emerging that reflect the realities of consumers’ lives. The predictions that result from their application are much more effective for brands trying to make decisions about features and benefits to add into products and what the price tolerance will be for consumers who will buy them.

If you are not challenging your research partners to embrace more sophisticated choice models, you are likely to miss the rich insights that can refine your pricing and product development most effectively. We see “budget” in its broadest sense as a vital part of a new and nuanced mathematical approach to choice modelling and right now that’s not something that is built into standard approaches. 

Steve Cohen is partner and co-founder of in4mation insights. He can be reached at scohen@in4ins.com.



BECOME THE FUTURE OF MARKETING RESEARCH

#1 RANKED MARKETING RESEARCH PROGRAM IN NORTH AMERICA
Source: Eduniversal

 Broad College of Business
MICHIGAN STATE UNIVERSITY

MASTER OF SCIENCE IN MARKETING RESEARCH

- 100% ONLINE or ON CAMPUS
- WORLD-CLASS FACULTY
- REAL-WORLD PROJECTS

Take advantage of our top-ranked M.S. program designed to make modern insights and analytics techniques accessible. Cutting-edge concepts are built into easily digestible lessons balanced with real-world marketing applications.

broad.msu.edu/msmr

●●● automotive research

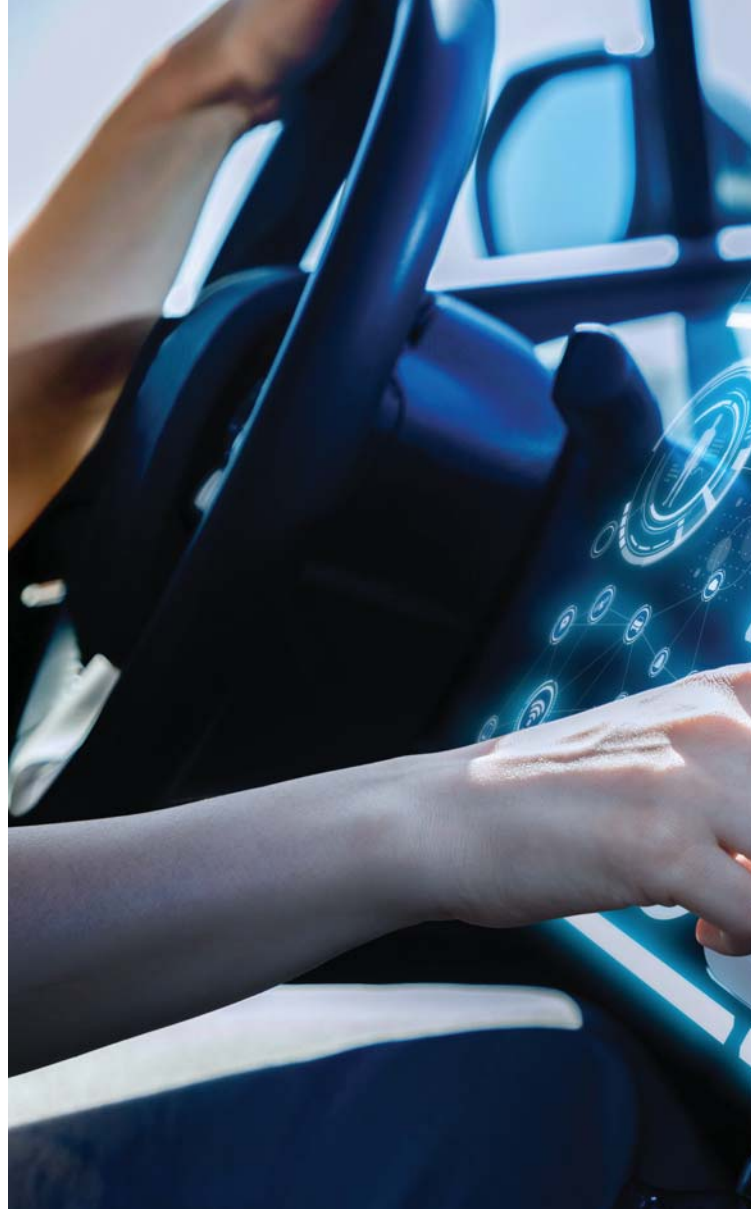
Driving interest

Gauging the future of electric and autonomous vehicles

| By Tim Grainey and Renah Wolzinger

snapshot

How researchers can help bring the EV and AV landscape into focus.



Two important trends within the automotive industry – the growth of electric vehicles (EVs) and the development of autonomous vehicles (AVs) – are spurring extraordinary changes in technological advances, manufacturing practices and even dealership selling and servicing approaches. In this article we examine how market researchers need to adapt their research perspectives to provide salient and cogent information to EV and AV manufacturers, their suppliers and stakeholders in the coming years.

Electric vehicles

Electric vehicle production and technological advances are now a top priority of manufacturers and suppliers throughout the automotive industry, reacting to growing concerns about climate and other environmental changes. However, EVs are currently a niche market in the U.S., with new EV sales at 2% of total new vehicle sales in 2020. That share is expected to rise to 7% of the market (6 million vehicles in 2025) and 18%-20% market share (19 million cars) in 2030. Tesla currently accounts for the vast majority of those sales. Consulting Firm LMC Automotive projects that battery-electric sales could hit 4 million vehicles in 2030 or 25% of the market.¹ IHS Market projects 25%-30% of U.S. new vehicle sales will be battery-electric or zero-emission by 2030 and 45-50% by 2035.²

California Governor Gavin Newsom's executive order in late 2020



that new vehicle sales with gasoline engines will be banned in the state from 2035 has added to the urgency for the transition to EVs within the industry. California alone is expected to have 4 million EVs by 2030.³

In April 2021, President Joe Biden proposed a \$174 billion investment into the electric vehicle market as part of his \$2 trillion infrastructure plan to help America recover from the pandemic. The American Jobs Plan includes building out EV-charging infrastructure with a national network of 500,000 EV chargers by 2030 (five times the current 100,000 chargers) plus rebates and tax incentives to buy American-made EVs and electrifying transit buses, school buses and the United States Postal Service's vehicles (over 225,000 in 2019). According to CBS News, "The plan would allow automakers to spur domestic supply chains, retool factories to compete globally and support American workers to make batteries and electric vehicles."⁴

Globally, China and the European Union are driving the rapid expansion of EV sales for new vehicles and combined are predicted to account for 72% of the global electric car market by 2030.⁵ China also will ban new vehicle sales with internal combustion engines (ICEs) in 2035 while the U.K., Ireland and the Netherlands plan to ban gasoline and diesel new car sales by 2030. Norway has utilized government tax breaks to drive electric vehicle costs below ICEs; as a result, the market share of battery-powered cars increased to 54% in 2020 in the

Nordic country, compared with less than 5% in most European nations.⁶ Global powertrain forecasts of electrified vehicles sales by Boston Consulting Group estimate that: "EVs will capture a third of the market by 2025 and 51% by 2030."⁷

Market researchers need to focus on consumer adoption of EVs over the next few years, including:

- Multi-country comparison tracking studies to pinpoint effective strategies in other countries that have driven more rapid EV adoption than in the U.S., as well as consumer satisfaction with EVs and changes in driving behaviors with EVs compared with ICEs.
- For domestic researchers, comparison of recent EV buyers with those who considered an EV but did not acquire one should focus on their reasons for purchase/consideration, driving habits, purchase price details, vehicle segment (e.g. SUVs, luxury

sedans), key demographics and other important measures. For EV buyers, assessing their average miles on a charge, battery charging times, usage/availability of public chargers, overall convenience of EV ownership, differences in driving an EV from a gasoline-engine vehicle as well as problem ratings, which have been higher on initial quality data with Tesla owners. The diary method for first-time EV buyers who also own an ICE vehicle could be edifying, particularly in cost comparisons for fueling/charging, servicing, etc.

- Tracking general reactions to future innovations, such as vehicle connectivity, online sales and mobile servicing, can provide guidance on general consumer acceptance for manufacturers in their development efforts prior to qualitative interviews and clinic tests. Specific focus on production, sales, marketing and customer experience from non-legacy automotive manufacturers (i.e., Rivian, Lucid Motors) would be of value.
- Message testing of concepts for dissemination of clear information to offset key concerns about EV ownership, such as reduction in battery costs, availability of government incentives, miles on a charge, charger availability and the risks of fires at charging ports (particularly in homes) due to reports of the massive amount of water firefighters require to put out fires on EV vehicle batteries.⁸ Qualitative interviews followed by tracking studies would help manufacturers, dealerships and their advertising agencies adjust their messaging, particularly with the push to sharply increase EV sales in the next decade.

Autonomous vehicles

AV sales for consumers were expected to be on the market in a limited way by 2020/2021 but are not available yet for consumer purchases. Other than testing robo-taxis in some cities, AVs are still some years away for consumers (despite claims from some Tesla owners that they are available now). A January 2020 report by the Victoria (B.C., Canada) Transport

Policy Institute predicts widespread, affordable cars that drive themselves will not be available until the 2030s or even 2040s.⁹ The technology will continue to move ahead, with at least one element (and frequently more) of advanced-driver assistance systems (ADAS) being available in virtually all new vehicles currently on the market. In addition, the consumer acceptance of these ADAS features (i.e., backup camera, lane assist, automated parking) is very high. The huge expected main benefit of self-driving cars is reduced accidents. According to a recent study, almost 585,000 lives could be saved between 2035 and 2050 by introducing driverless vehicles on the roads; however, as per the National League of Cities' research, merely 6% of the largest cities in the U.S. include the potential effects of driverless technology into their transportation plans.¹⁰

The primary area of emphasis currently for AV applications is on the heavy-duty truck side and for commercial vehicles in closed or "behind the fence" environments (i.e., ports, bus yards), where AVs are being tested and utilized. An article in *Automotive News/Shift Mobility Report* said, "Beyond improving driver comfort, diminishing fatigue and striving for safety benchmarks, truck operators can make significant fuel-efficiency improvements with an automated system in active control. The coronavirus has brought renewed appreciation to trucking's role in underpinning essential-goods delivery, with 72.5 percent of all freight transported in the U.S. hauled by the trucking industry, according to the American Trucking Associations."¹¹ A fuel savings of 5 to 10 percent is huge within the trucking industry.

TuSimple, a Chinese autonomous heavy-duty truck company with its headquarters in San Diego, recently reduced by more than 40% the travel time of a 951-mile test run of agriculture products from Nogales, Ariz., to Oklahoma City in May 2021. The run usually takes at least 24 hours but the autonomous vehicle took only 14 hours and six minutes. A human driver worked on the pickup and delivery of the produce but the vehicle

drove itself through the long interstate portion from Tucson to Dallas, with a human safety driver on board in order to comply with various federal and state guidelines.¹²

One of the largest barriers of AVs to overcome is whether to proceed with LIDAR technology or multiple cameras to guide the vehicle on the appointed route. Other concerns are the current road infrastructure as well as existing vehicle technological infrastructure which will need to change to make fully automated vehicles feasible on U.S. roads. The determination of who is at fault when an AV is in an accident is another important decision, particularly for the insurance industry.


Another huge barrier to future consumer adoption of driverless vehicles is consumer hesitancy. Fourteen percent of drivers said they would trust riding in a vehicle that drives itself but 86% either said they would be afraid to ride in a self-driving vehicle (54%) or are unsure about it (32%). A poll by the American Automobile Association showed that respondents needed to be convinced that self-driving cars are safe before they embrace them. The national survey of just over 1,000 adults, conducted predominantly online but also over the phone in January, 2021, found that only 22% of drivers said they felt manufacturers should focus on developing self-driving vehicles. Most respondents (80%) said they wanted current vehicle safety systems, like automatic emergency braking and lane-keeping assistance, to work better and more than half (58%) said they wanted these systems in their next vehicle. The findings, the automotive group said, "signal that people are open to more sophisticated vehicle technology which, if they provide positive experiences for drivers, will open the road to self-driving vehicle acceptance."¹³

Marketing researchers can assist manufacturers and suppliers with consumer insights as they develop AVs. Some particular emphases on the car and light truck side could include:

- Systematic qualitative and quantitative data from people who have had experience in robo-taxis.

- Tracking general consumer interest in AVs, including perceived benefits and obstacles. Comparisons of EV owner reactions with non-EV owners would be edifying as the EV owners can be seen as early adopters of new technologies such as AVs. Understanding what would encourage them to consider an autonomous vehicle for future purchase/lease/rental (including incentives and dealership test rides) as well as situations in which they would utilize an AV (work, vacation trips, etc.) would be of value to manufacturers.
- More clinic work with prospective consumers, to not only drive the technology development but also to test messaging to persuade the general public of unique elements of AVs (safety, savings on service, etc.). This data will also support sales projections as these vehicles come to market in the future.
- Awareness and reactions to the current development of autonomous trucks for shipping and other “behind the fence” activities.

Always been creative

Automotive researchers have always been creative in studying this complicated and evolving sector. Electric vehicles and autonomous vehicles in particular will undoubtedly be the focus of new and existing insights-gathering approaches by market researchers in the years to come. 

Tim Grainey is founder and managing member of Strategic Research Initiatives. He can be reached at srigrainey@cox.net. Renah Wolzinger is a professor at Golden West College. She can be reached at rwolzinger@gmail.com.

REFERENCES

- 1 “Honda will build its own electric vehicles.” (2021). CNBC.com, June 28.
- 2 Lutz, Hannah. (2021). “The battery got in the way of mass adoption.” *Automotive News*, April 19, p. 20.
- 3 Bollag, Sophia. (2019). “California bans government purchases of most gas-powered cars under Newsom climate order.” *Sacramento Bee*, November 18.
- 4 Nelson, Steven. (2021). “President Biden unveils multi-trillion dollar infrastructure plan.” *NYPost.com*, March 31.
- 5 Foldy, Ben and Rebecca Elliott. (2021).

“Shift to electric vehicles spurs bid to make more batteries in U.S.” *The Wall Street Journal*, January 26.

6 Carrington, Damian. (2021). “Electric vehicles close to ‘tipping point’ of mass adoption.” *The Guardian*; January 22.

7 Mosquet, Xavier, Aakash Arora, Alex Xie and Matt Renner. (2020). “Who will drive electric cars to the tipping point?” *BCG.com*, January 2.

8 Farivar, Cyrus. (2021). “Federal regulators warn of risks to firefighters of electrical vehicle fires.” *NBCNews.com*, June 20.

9 Mays, Kelsey. (2020) “Which cars have self-driving features for 2020?” *Cars.com*, March 4.

10 “It’s 2020! So, where are the self-driving cars?” (2020). *Route4me.com*, March 14.

11 Bigelow, Pete. (2021) “Ramping up: Plus to roll big rigs on a ‘continuum’ toward self-driving future.” *Automotive News/Shift Mobility Report*, March, p. 17.

12 Kolodny, Lora. (2021). “TuSimple says its self-driving trucks shaved 10 hours off a 24-hour run.” *CNBC.com*, May 19.

13 Mohn, Tana. (2021). “Americans want self-driving cars, but want safety first.” *Forbes.com*, February 28.



The power of Quirk's in the palm of your hand

Download the free Quirk's mobile app




QUIRK'S
MEDIA

••• special advertising section

12 TOP CPG RESEARCH COMPANIES



Aspen Finn 
strategy + insight

Aspen Finn

Founded 2021 | 40 employees
Julia Eisenberg, Executive Vice President

CPG brands face an array of challenges on the journey to reach consumers and a misstep at any stage could have dramatic consequences for a product's reception and longevity. Companies can avoid the risk of marketplace failure by utilizing research partners who specialize in consumer packaged goods and the methods necessary to make them successful.

Whether you're introducing a new product or improving an existing one, the following companies are ready to meet your research needs. From consumer panels and online surveys to package design and shelf testing, these companies offer a variety of solutions and methodologies to help your brand find success in market.

Aspen Finn delivers deeper, more relevant insights to help brands grow. Using a proven framework that embraces how people naturally relate to the world, we listen, ask, observe and synthesize feedback into actionable stories to deliver the right balance of consumer perspectives and product needs. We know that to understand what people think, you must first understand how they think. We immerse ourselves in your challenge and deliver custom research with tangible results so your brand can





Consumer Insights. Delivered.

Curion

Founded 2017 | 200+ employees
Sean Bisceglia, CEO



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

Phone 1-224-632-1919
curioninsights.com/certified-moderator-program
curioninsights.com

change, persuade, include and grow with confidence. Get in touch: hello@aspenfinn.com.

Phone 1-888-802-1330
aspenfinn.com



31 supported languages, freeing you from repetitive categorization. Focus on what truly matters – producing deeper and more meaningful insights. Thanks to its adaptive AI, Caplena can understand any survey context and industry with minimal user input and no tedious setup.

Phone 41-79-455-52-17
www.caplena.com



Caplena

Founded 2017 | 10 employees
Pascal de Buren, Co-Founder
Maurice Gonzenbach, Co-Founder

Wondering what customers think about your stores in Google Maps Reviews or your customer satisfaction surveys but have no time to read them all? Caplena.com uses augmented intelligence to drastically reduce the amount of time it takes to analyze large amounts of free text from reviews or responses to open-ended questions. Within minutes Caplena identifies topics and auto-tags your entire data set in any of the

www.quirks.com



Decision Analyst

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



Decision Analyst helps its clients create winning marketing strategies, develop exciting new products, build powerful brands and optimize pricing. The firm melds qualitative investigations, strategic survey research, advanced analytics, mathematical modeling and simulation to solve the most complex marketing problems. New product development is a major focus, including ideation and brainstorming, new product concept development, concept testing, IHUTs, virtual shelf sets and package testing, name testing, and volumetric forecasting. CPG is Decision Analyst's major focus, including foods, beverages, OTC drugs, health and beauty. Decision Analyst operates its own worldwide consumer panels and serves clients in the U.S., Canada, Europe and Asia.

Phone 1-817-640-6166
www.decisionanalyst.com/services/newproductresearch



Discuss.io

Founded 2012 | 57 employees
Simon Glass, CEO

Discuss.io is helping the world's largest companies turn experiences into insights. As the go-to purpose-built qualitative research platform, CX, UX and insights teams, enterprise-level brands and agencies trust Discuss.io to enable deep, purposeful connections with their key audiences and to securely capture and share insights across their organizations in real time. By giving voice to people's experiences to drive insights and outcomes, Discuss.io is helping to transform the brand and customer relationship and usher in the new area of customer intelligence. Our award-winning technology has enabled hundreds of enterprise-level brands and their partners around the world including Unilever, Target, Ipsos and Mastercard to deliver a new approach for the market research industry. For more information, visit www.discuss.io.



Phone 1-866-557-6716
www.discuss.io



Fieldwork

Founded 1980 | 250+ employees
Steve Raebel, President



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



Fuel Cycle

Fuel Cycle

Founded 2009 | 120+ employees
Erin Gilad, CEO

Fuel Cycle's award-winning market research cloud is the most comprehensive intelligence-gathering ecosystem that exists today.



Our platform enables decision-makers to maintain constant connections with their customers, prospects and users to uncover real-world, actionable intelligence. By integrating human insight with critical business data, and through automated quantitative and qualitative research solutions, Fuel Cycle's market research cloud powers product innovation, brand intelligence and enhanced user experience. Breakthroughs require action. We built Fuel Cycle to ignite it.

Phone 1-323-556-5400
www.fuelcycle.com

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

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

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!



E-mail susan@murrayhillnational.com
Phone 1-972-707-7645
www.murrayhillnational.com



MURRAY HILL
NATIONAL

Murray Hill National

Founded 2013 | 35 employees
Susan Owens, COO

Clients trust Murray Hill National with thousands of studies per year as



InsightsNow

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



InsightsNow is a full-service, award-winning behavioral research firm that partners with companies across a wide array of industry verticals to accelerate business decisions. We specialize in supporting companies'

www.quirks.com





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.

E-mail sales@questmindshare.com
questmindshare.com
Phone 1-416-860-0404



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. Make sure your product is the one consumers reach for, with Toluna's innovative solutions designed for the unique needs of CPG companies, including ideation and co-creation; new product development; campaign, creative and message testing; package design; and shelf testing.

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



Veylinx

Founded 2015 | 50 employees
Anouar El Haji, Founder and CEO



Veylinx is the most realistic behavioral insights platform for confidently answering critical business questions during all stages of product innovation. To reliably predict demand, Veylinx captures insights through a Nobel Prize-winning approach in which consumers have real skin in the game. This is a major advance from traditional market research practices that rely on what consumers say they would hypothetically buy. Veylinx's unique research methodology is trusted by the world's most innovative consumer goods companies, including P&G, Unilever, PepsiCo, Nestlé, General Mills, Reckitt and Kimberly-Clark.

E-mail info@veylinx.com
veylinx.com



CALENDAR OF EVENTS

••• can't-miss activities

The **QRCA** will hold the virtual wing of its 2022 Annual Conference on **January 12-13, 2022**. Visit www.qrca.org/page/annual-conference.

The **Insights Association** will hold its 2022 CEO Summit on **January 24-26** in **Miami**. Visit www.insightsassociation.org/conference/2022-ceo-summit.

Quirk's Media will host Webinar Wednesday on **January 26**. Visit www.quirks.com/events/webinar-wednesday-january-26-2022.

CRIC will hold its Industry Virtual Co-Op and Careers Fair on **January 28** as a virtual event. Visit bit.ly/3GqlvTj.

IQPC will hold its Chief Data and Analytics Officer Exchange - Global on **January 30 - February 1** at the SLS Hotel in **Beverly Hills, Calif.**

Merlien Institute will host its UX360 Research Summit on **February 8-9** as a virtual event. Visit bit.ly/3y8oZXN.

The **Strategy Institute** will hold its Digital Customer Experience Strategies Summit 2022 on **February 15-16**. Visit www.digitalcustomerexp.com.

Strategy Institute will hold its Digital Marketing for Financial Services West Summit 2022 as a virtual conference from **February 22-23**. Visit www.financialdigitalmarketingwest.us.

Quirk's Media will host Webinar Wednesday on **February 23**. Visit www.quirks.com/events/webinar-wednesday-february-23-2022.

IQPC will hold its Intelligence Automation Exchange on **February 28 - March 1**, in **London**. Visit bit.ly/3nus0Bu.

Informa Connect will hold InsignTALENT vs. InsignTECH on **March 1-2** as a virtual event. Visit informaconnect.com/consumer-insights.

Merlien Institute will hold its Qual360 North America 2022 on **March 8-9** at Gallup HQ in **Washington, D.C.** Visit bit.ly/3IwYv6N.

Quirk's Media will host Webinar Wednesday on **March 23**. Visit www.quirks.com/events/webinar-wednesday-march-23-2022.

The **Insights Association** will hold the IA Annual Conference on **April 4-6** in **Philadelphia**. Visit www.insightsassociation.org/network-learn/conferences.

Merlien Institute will hold its Qual360 Europe 2022 on **April 5-6** in **Berlin**. Visit bit.ly/3dzKdEe.

The **2022 Quirk's Event - Chicago** will be held on **April 11-12**, at the Sheraton Grand in **Chicago**. Visit www.thequirksevent.com.

The **2022 Quirk's Event - London** will be held on **May 4-5**, at the InterContinental London O2 in **London**. Visit www.thequirksevent.com.

The **QRCA** will hold the in-person wing of its 2022 Annual Conference on **May 16-18**, in **San Diego**. Visit www.qrca.org/page/annual-conference.

The **Strategy Institute** will hold its Digital Marketing for Financial Services Canada Summit 2022 on **June 14-15**, in **Toronto**. Visit www.financialdigitalmarketing.com.

Merlien Institute will hold its CIEX Data Insights Summit 2022 on **May 10** as a virtual summit. Visit bit.ly/3dyqCEA.

The **Strategy Institute** will hold its Future of Pharma Marketing Summit 2022 on **May 18-19** in **Toronto**. Visit www.digitalpharmasummit.ca.

Quirk's Media will host Webinar Wednesday on **May 18**. Visit www.quirks.com/events/webinar-wednesday-may-18-2022.

The **Insights Association** will hold the X Event on **June 6-7** at a location to be announced. Visit www.insightsassociation.org/network-learn/conferences.

The **Strategy Institute** will hold its Digital Marketing for Financial Services Canada Summit 2022 on **June 8-9** in **Toronto**. Visit www.financialdigitalmarketing.com.

Quirk's Media will host Webinar Wednesday on **June 15**. Visit www.quirks.com/events/webinar-wednesday-june-15-2022.

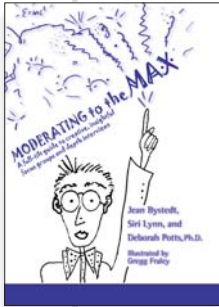
Merlien Institute will hold MRMW North America 2022 on **June 15-16** in **Atlanta**. Visit na.mrmw.net.

Merlien Institute will hold MRMW APAC 2022 on **July 6-7** in **Singapore**. Visit apac.mrmw.net.

The **2022 Quirk's Event - New York** will be held on **July 20-21** at the Javits Center in **New York**. Visit www.thequirksevent.com.

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

ESSENTIAL READING FOR RESEARCH PROFESSIONALS



Moderating to the Max

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

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

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

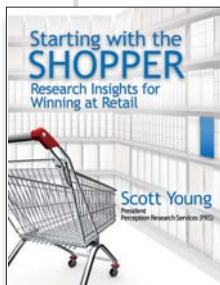


Qual-Online: The Essential Guide

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

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

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

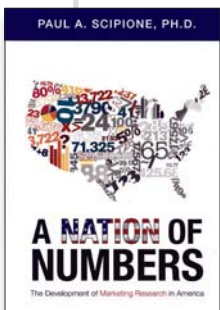


Starting with the Shopper

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.

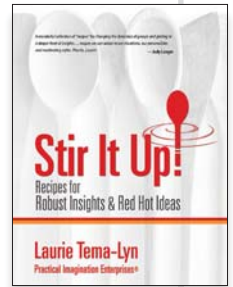
546 pages, 7x10, 978-0-9852482-2-2 \$49.95 cloth

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

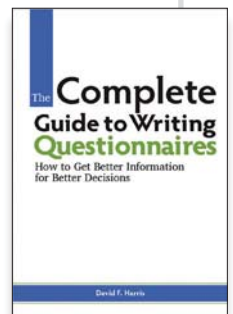


The Complete Guide to Writing Questionnaires

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

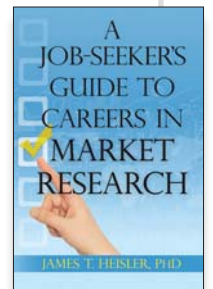


A Job-Seeker's Guide to Careers in Market Research

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!



Alchemer p. 24
800-609-6480 | www.alchemer.com



Burke Institute. p. 5
800-543-8635 | www.BurkeInstitute.com



Curion, LLC. p. 11
800-291-1907 | https://curioninsights.com



Fieldwork Inc. Front Cover, p. 9
800-TO-FIELD | www.fieldwork.com



Insight Management Academy. p. 41
44-7982-245807 | www.insight-management.org



Medscape Market Research Back Cover
212-301-6700 | www.medscape.com



Paramount Market Publishing. p. 84
607-275-8100 | www.paramountbooks.com



Quirk's Talent. p. 35
651-379-6200 | www.QuirksTalent.com



Telepoll Market Research. p. 58
416-977-0608 | www.telepoll.net



Applied Marketing Science, Inc. p. 26
781-250-6300 | www.ams-inc.com



C&C Market Research, Inc. Inside Back Cover
479-785-5637 | www.cmarketresearch.com



Decision Analyst p. 18
817-640-6166 | www.decisionanalyst.com



Global Survey p. 54
757-749-6999 | www.globalsurvey.gs



InsightsNow p. 16
541-757-1404 | www.insightsnow.com



Michigan State University p. 73
517-884-1669 | http://board.msu.edu/msmr



Quest Mindshare p. 51
416-860-0404 | www.QuestMindshare.com



Radius Global Market Research p. 28
212-633-1100 | radius-global.com



WEVO Conversion. p. 13
888-835-6828 | www.wevoconversion.com



Ascribe p. 7
877-241-9112 x55 | www.goascribe.com



Clear Seas Research pp. 46-47
248-786-1683 | www.clearseasresearch.com



EyeSee Research p. 20
646-547-1449 | www.eyesee-research.com



Innovate MR, LLC. p. 22
888-229-6664 | www.innovatemr.com



MREF p. 55
903-484-MREF | www.MRGivesBack.org



MindField Tech p. 31
304-343-9650 | www.mindfieldtech.com



Quirk's Events. pp. 66-69
651-379-6200 | www.TheQuirksEvent.com



Schlesinger Group. Inside Front Cover, p. 3
866-549-3500 | www.schlesingergroup.com

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

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

POSTMASTER: Please send change of address to Quirk's Marketing Research Review P.O. Box 22268, St. Paul, MN 55122. © 2021 Quirk Enterprises Inc. All rights reserved. Quirk's Marketing Research Review is not responsible for claims made in advertisements.



“Adopting new tools, data and technology is a good place to start, but true culture change requires mobilizing the right people, training them on how to fully leverage those tools and integrate them into their existing processes.”

10 minutes with...

Larisa Mats
Head of Consumer Insights
Brunswick Corporation

You’ve worked in several industries – CPG, pharma, lottery, etc. How do these experiences impact your current role at Brunswick?

All the formative experiences I’ve had play a vital role in how I do my job today. I spent the early part of my career in a different functional area altogether, cross-selling cash management services to the multinational clients of a financial institution. That’s where I first learned the art of client service and business development, how to develop a cost-benefit analysis and influence decision-makers.

After business school, I transitioned to the CPG industry and learned to tell stories with data – first on the supplier side and then on the client side. My next role was global, encompassing insights and analytics for base business and new products, but I had to switch industries to get the opportunity to broaden my skill set.

Building an insights function for the Illinois Lottery gave me the chance to recruit a new team from scratch, play a lead role in strategic planning and interact with all stakeholder levels across brand, marketing, sales, digital, public relations, legal and even finance!

Each of these experiences were important building blocks in helping me drive insights adoption at Brunswick.

What is the most challenging aspect of conducting research from a direct-to-consumer perspective?

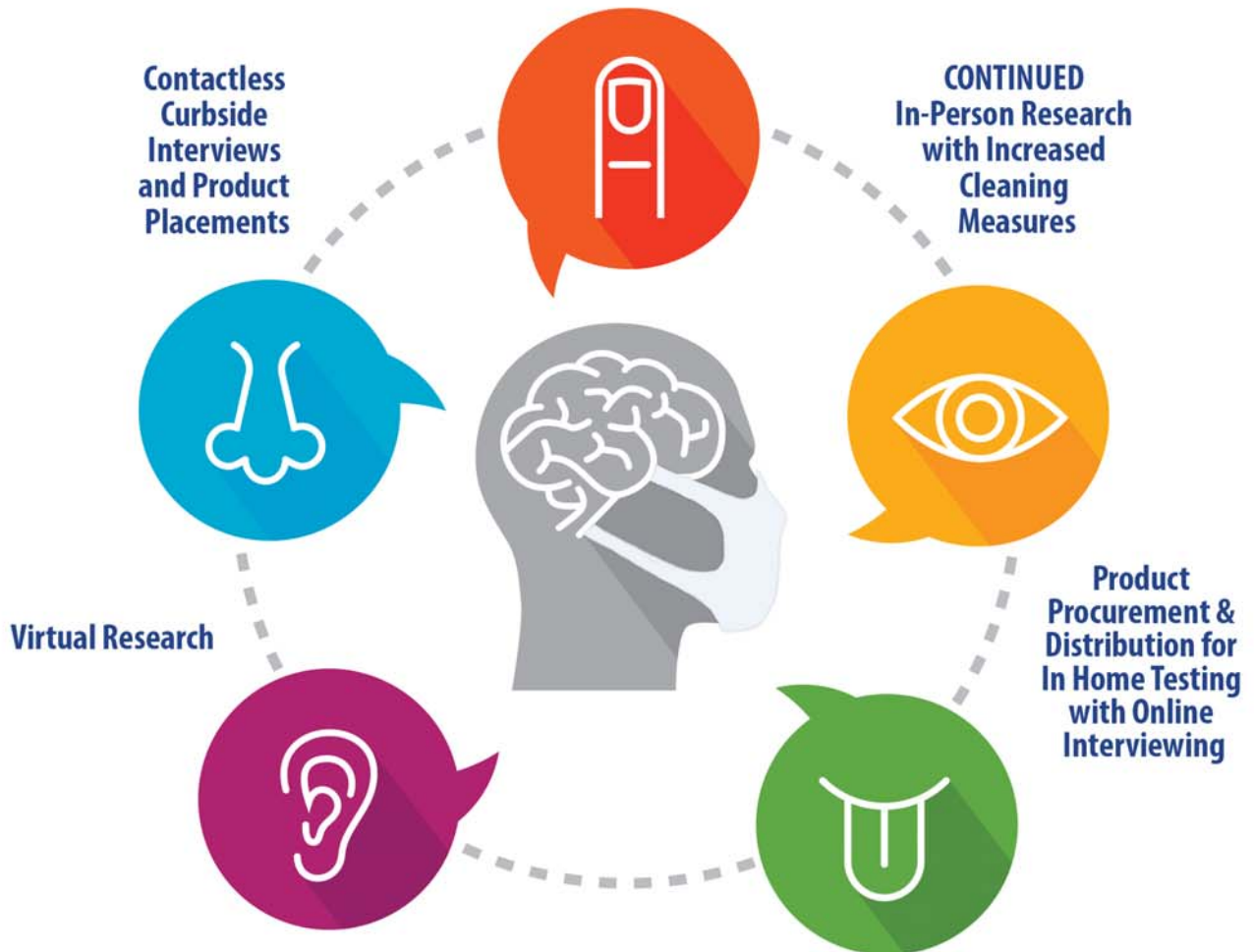
Data quality is so important and highly scrutinized – if you can’t trust the data collection method, it’s impossible to draw conclusions – so we work with research partners who have the highest data quality standards, employ trusted moderators and are leaders in the best practices of survey design. An adjunct challenge is finding the right consumers to sample at a reasonable cost.

Do you have any tips for researchers looking to remove internal data silos?

Yes! Give yourself plenty of time because it won’t happen overnight. But when it does, it’s incredible.

Adopting new tools, data and technology is a good place to start, but true culture change requires mobilizing the right people, training them on how to fully leverage those tools and integrate them into their existing processes.

Market **C&C** Research



TASTE. TOUCH. FEEL. SMELL.

Now, more than before...

UNMATCHED SENSORY TESTING!

- Eyetracking
- Qualitative Research
- Quantitative Research
- On-site Interviews
- Hispanic Interviewing
- Project Management
- Programming
- Over 100 mobile interviewing devices
- 37 data collection locations nationwide
- Panel Augmentation

CONTACT INFO: CORP@CCMARKETRESEARCH.COM | 877-530-9688 | 479-785-5637

WWW.CCMARKETRESEARCH.COM



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