QUIRK'S

For marketing research and insights professionals

TAKING REAL-WORLD ACTIONS TOWARD TRULY INCLUSIVE RESEARCH

HOW MICROSOFT IS PUTTING DEI PRIORITIES INTO MOTION

PLUS

Are doctors sick of detailing visits?

How research can help CEOs sleep at night

A how-to guide for trackers

ADVERTISING SECTIONS

20 Top In-Home Use-Testing (IHUT) Research Companies

6 Top Automotive Research Companies

Quirk's Marketing Research Review
May/June 2022
Volume XXXVI Number 3
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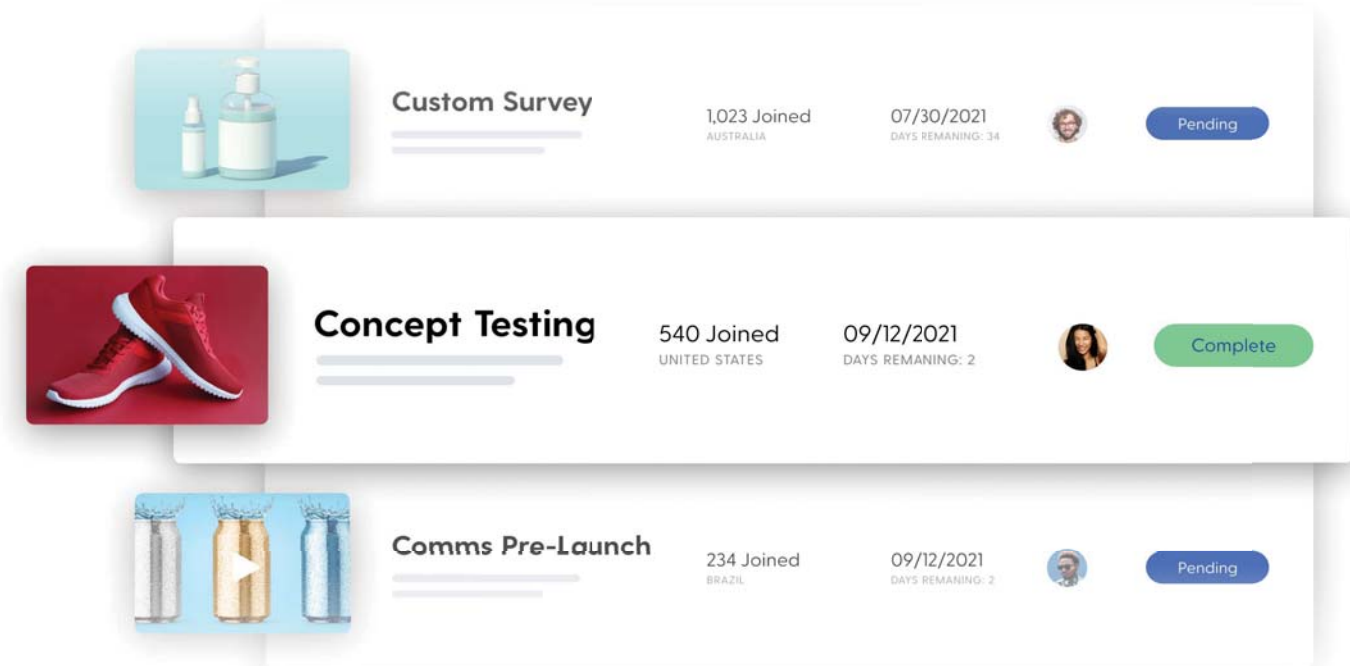

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••• industry partners

Thank you

Each year, Quirk's partners with marketing research and insight associations and organizations that share our goal of taking the industry to a new level of excellence.

Because the goodwill of the insights industry is the foundation of Quirk's success, we'd like to extend our gratitude to our 2022 industry partners:

AQR, ASC, AURA Insight, Canadian Research Insights Council, Colour Of Research, ESOMAR, IMA, Informa (TMRE), Insights Association, ICG, Insights in Color, Market Research Benevolent Association, Marketing Research Education Foundation, Market Research Institute International – The University of Georgia, MSPA Americas, Paramount Market Publishing, Printemps des études, Society of Sensory Professionals, succeet, The Research Club, QRCA and Women In Research.

••• awards

The 2022 Marketing Research and Insight Excellence Awards

Powered by Quirk's Media, the Marketing Research and Insight Excellence Awards celebrate the researchers, suppliers and products and services that are adding value and impact to marketing research.

The awards are open to all researchers worldwide. Nominations close June 20, 2022. For information on categories visit quirksawards.com.

// E-newsworthy

Qualitative research and the decline of the conversation
https://bit.ly/3Dzbt1R

Outback cut the CCO role. Is customer satisfaction at risk?
https://bit.ly/3qWM7WO

Can market research be used to align public opinion with facts?
https://bit.ly/36LctnG

// Noted Posts

Quirk's Blog

Loyalty, pricing and customer behaviors in 2022
https://bit.ly/3wUHJeA

Research and insights organizations share hopes and goals for 2022
https://bit.ly/3uP927h

Do consumers read customer reviews?
https://bit.ly/3j0ay0o

Research Industry Voices

Qualitative research: Building better conversations in 2022
https://bit.ly/373EvKT

Seven ways to implement change within your market
https://bit.ly/3IVmXOh

The value of customer delight
https://bit.ly/36NVuB1

Research Careers Blog

The assumptions and realities surrounding job references
https://bit.ly/3iSBEqQ

Remote work rules the day, but coworking isn't giving ground
https://bit.ly/388nj7t

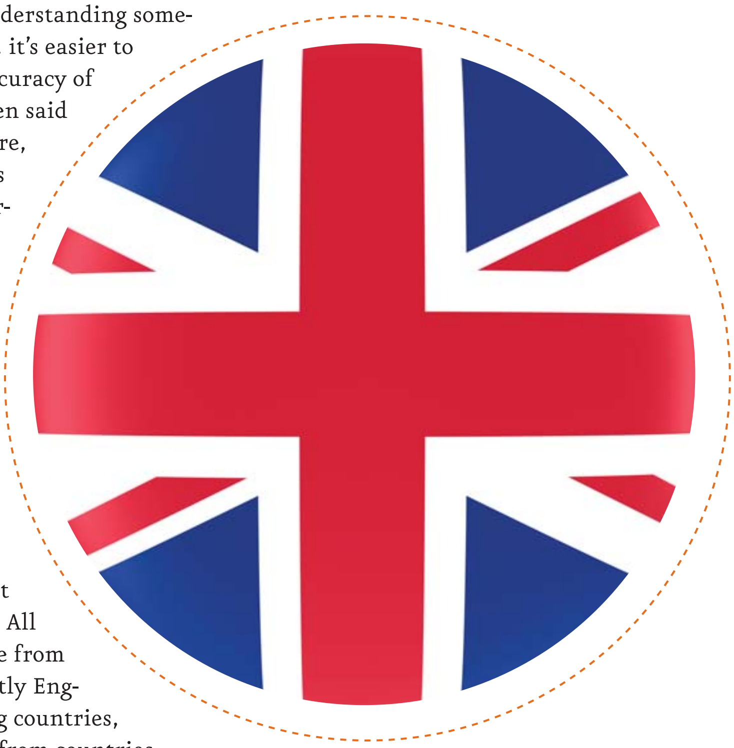
8 ways to foster female leadership
https://bit.ly/3iXCRgs

••• consumer psychology

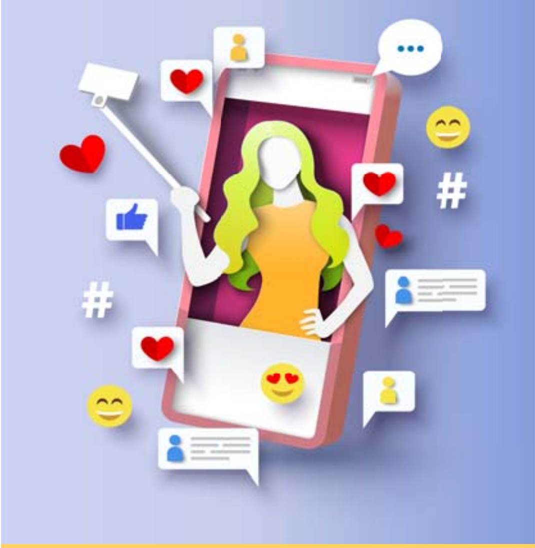
British accent engenders more trust

More than two-thirds (68%) of respondents surveyed by language education firm Preply said that someone's accent changes how trustworthy they found that person to be, as reported by Kylie Moore in a Preply blog post ("Study reveals accents Americans find most attractive").

What makes an accent seem trustworthy? Research from the University of Chicago suggests that cognitive fluency may also play a role. If the brain has more difficulty understanding someone's speech, it's easier to doubt the accuracy of what has been said and, therefore, think of it as less trustworthy.



There may be some correlation between this phenomenon and the accents the survey identified as most trustworthy. All of them were from predominantly English-speaking countries, rather than from countries where English is a second language.
More than half of respondents said a British accent was one they could trust and 22% said it would make someone seem more trustworthy. Thirty-eight percent said a Canadian accent was trustworthy, with 15% saying it would make someone seem more trustworthy. Similarly, among respondents, 38% said they could trust an Australian accent, matching the total for a Canadian accent, although slightly fewer (13%) said it would make someone seem more trustworthy.



••• social media research

Influencers can't rely on blue check mark for sales impact

New research from the University of Maine Business School shows that, for social media influencers, the verification provided by the sought-after blue check mark (indicating the account has been vetted and the user's identity confirmed) isn't always a positive.

For one part of the study, "When influencers are not very influential: The negative effects of social media verification," published in February in the Journal of Consumer Behavior, researchers presented study participants with either a fitness or beauty influencer account that was either verified or unverified and advertised a product. The participants were again asked to rate them on a scale from one to seven on various factors that were consolidated into ratings for attractiveness, trustworthiness, credibility and celebrity. The participants also rated how well the advertisement "fit" with the account and how likely they were to buy the product.

Not only do consumers associate verification more with celebrity than authenticity or credibility but, because of that, they are less likely to trust a verified social media influencer who advertises a brand that is inconsistent with their usual messaging. Even when brand and influencer align, consumers do not trust verified accounts more than their unverified counterparts.

As we continue to gather in-person at industry events, I think about the idea generation that happens just in our casual moments together. A lot of value comes from in-person research, including the collaboration behind the mirror. Watching consumers almost always leads to great ideas.

Merrill Dubrow, CEO of M/A/R/C Research

Clients and respondents are relishing being back in person. We have been thrilled to help researchers get close to the customer in a rich environment that facilitates high engagement, instinctive responses, product interaction, visual cues, and ease of conversation flow.

Steve Schlesinger, CEO of Schlesinger Group

I'm thrilled when I receive positive feedback from our clients regarding successful in-person research. If there was ever a time to directly explore how your brand is received by your audience, it is now.

Sarah Kotva, Executive Vice President of Fieldwork

The variety and nature of in person research covers all industry sectors with healthcare, medical UX and automotive along with consumer product testing being particularly strong. The viewing back room is pleasingly vibrant with corporate clients hugely enthused with immersion in person research allows.

Bob Qureshi, Managing Partner of iView London

In-person research, by far, is an effective, relevant, diverse and inclusive way of getting that deeper level of understanding of how we, as humans, are evolving.

Roben Allong, President of QRCA

#facetofacemrx

Online research methods will never replace the experience of immersing yourself in a culture or city. The benefits of in-person research start well before any interviews begin; realized by the delivery of rich insights by humans through the nuances of language and movement that are infinitely more challenging to capture digitally. As brands continue to navigate global unknowns, in-person methods remain fundamental to our success as storytellers and data translators and will continue to deliver key insights for better business outcomes.

Kristin Luck, President of ESOMAR

As research teams emerge … they need to know how and why consumer opinions, habits and preferences have changed. In-person research has always played a critical role in developing deep understanding of people and change.

Melanie Courtright, CEO of Insights Association

By Joseph Rydholm, Quirk's Editor

Report bodes well for research

©Clare Pix Photography www.clarepix.com

Joe Rydholm can be reached at joe@quirks.com

Earlier this year Brandwatch put out a report called The Marketer of 2022 (https://bit.ly/3Ktpnpb) that looked at some of the skills marketers will need in order to succeed this year. Much of it was based on a survey completed by respondents from Brandwatch's network of corporations and organizations and while the sample size (63) is small there were nevertheless some interesting nuggets for insights professionals.

The report's focus is decidedly on the digital end of things, in keeping with Brandwatch's emphasis on the concept of digital consumer intelligence, which it defines as efforts that enable "organizations to adapt to a fast-changing world by connecting decision makers to strategic insights derived from a combination of real-time online data, customer data and marketing intelligence."

But I was happy to see that, in a section on other methods of data-gathering that were mentioned by survey respondents, nearly all of the approaches mentioned were qualitative: in-depth interviews, focus groups, in-person, phone, webcam. Others included user-journey tracking technology, word-of-mouth and community platform information-gathering (forums, social media groups, etc.).

In the early months of the pandemic, Quirk's readers who responded to our annual survey for our 2020 Q Report and client-side speakers at our virtual events that year cited numerous anecdotes of the insights function suddenly being discovered by their entire organization, as if some of them never knew that such a department existed. As the whole world tried to adjust to a horrible reality, these new friends were desperate for information on what the pandemic would mean for their customers, their industry and their organization. Researchers of course were happy to oblige and many reported a welcome improvement in their function's internal standing, as if it suddenly dawned on their coworkers that, hey, this whole marketing research thing is kind of a good idea!

While the pandemic spurring newfound notoriety for researchers was great, what wasn't so great was the virus's impact on in-person research. The focus group shops and interviewing facilities pivoted as best they could and I'm guessing it has been a long journey back to anything resembling normal. But the fact that marketers in the Brandwatch report saw fit to single out so many in-person/qualitative research methods as having value is certainly a good sign.

And it's not just that small group of marketers who feel that way. In session after session at our three Quirk's Events last year, speakers talked of their internal clients calling for all forms of qualitative to add color and nuance to the data streaming in from the various digital consumer intelligence rivers. It's the need to find the why and the so-what.

Making sense of all the data

The Brandwatch study also asked respondents about the resources or tools to best support insight generation and again, bearing in mind the small sample size, the presence of search and social data analysis tools atop the list isn't surprising, given the rise of omnichannel. But close behind is data visualization tools, a result that also jibes with marketers' oft-repeated cries for help with giving shape to and making sense of all the data they now have access to.

(Speaking of cries for help, in a similar vein elsewhere in this issue, Bob Passikoff draws from his firm's study of what keeps CMOs up at night to explore the ways that marketing research and insights departments can supply the data and information to answer CMOs' vexing questions and help them sleep a little more soundly.)

And to a question about the challenges their teams are currently facing, nearly 40% of Brandwatch respondents cited "lack of insight into the customer journey/experience" (tied with "difficulty predicting the future" – is *anyone* finding that easy?!). Again, in their case, the customer journey they're most likely referring to and concerned about is predominantly a digital one but as with the other information needs highlighted in the report, I think this is another opportunity for research to come to the rescue!

ASK THE **EXPERT**

Expert answers to important research questions.

How can insights keep up with the rapid changes in consumerism?

In such a short time, the human experience has changed exponentially. Things we did not consider two years ago are now required for everyday business. Drive-up groceries, app-enabled checkout, contactless payments, free deliveries – the list goes on. In just the last five years, the speed of package delivery has increased by over 100% with companies like Amazon. And I know personally, as a consumer, I require my packages (diapers specifically) to have a two-day delivery window or I won't even consider buying from that retailer. Products and services no longer have the comfort of time; speed prioritization is imperative for success.

Technology-first products and solutions will continue to revolutionize the way we consume services throughout all industries, and only companies who truly understand their customers will succeed. To match the pace, there is a rising demand for the evolution of the research experience to meet the needs of a changing and growing customer base. New trends are disrupting business models and forcing tech-enabled and customer-centric solutions to pick up the pace.

The days of waiting, elongated A/B testing and waterfall-released products now create too many delays. By the time the product (or your research) launches, customer needs have changed or more nimble competitors have already captured the market.

The challenge is we must offer a product or service that customers cannot resist and that the competition cannot beat. The trick is finding a way to achieve quality without prohibitive cost and offer solutions that are both user-friendly and scalable for future change. Strategies must evolve with our customers and the world, as what makes you great today will not necessarily keep you great tomorrow. Research can empower you to act on those trends, faster.

Steve Jobs notably stated, "You've got to start with the customer experience and work backwards to the technology, you cannot start with the technology and try to figure out where you are going to sell it." So, whether you sell technology, or some other product or service, the underlying message here rings true. You must understand your customers and their journey intimately. If you don't, someone else will, so make sure to future-proof your business with a vision and a strategy for quick and actionable change, alongside a deep understanding of your evolving customer.

Ask yourself and your team honestly: Where are our customers coming from? Why do they need our service? What are the expectations they have? What obstacles will they encounter along the way? And most importantly, what will they need next?

When was the last time you asked them exactly what they want? It's time we start truly prioritizing the answers.

Amanda Keller-Grill

SVP, Global Innovation & Product Strategy
InnovateMR

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

2022 INSIGHT PLATFORMS

29 Top INSIGHT PLATFORMS for 2022

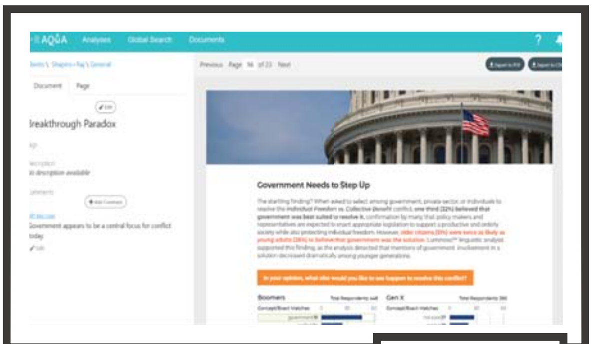
Qualitative Platform

Extract more insight in less time with S+R AQuA™

SHAPIRO+RAJ AQUA™

Awash with data, starved for time and prone to biases, we likely leave deeper insights on the table. S+R AQuA™ is our proprietary advanced qualitative analytics engine powered by machine learning and artificial intelligence to analyze natural language data via transcripts. Alone or with Luminoso™, a technology licensed from MIT, we uncover hidden connections and fresh insights with more depth and in less time than humans could alone.

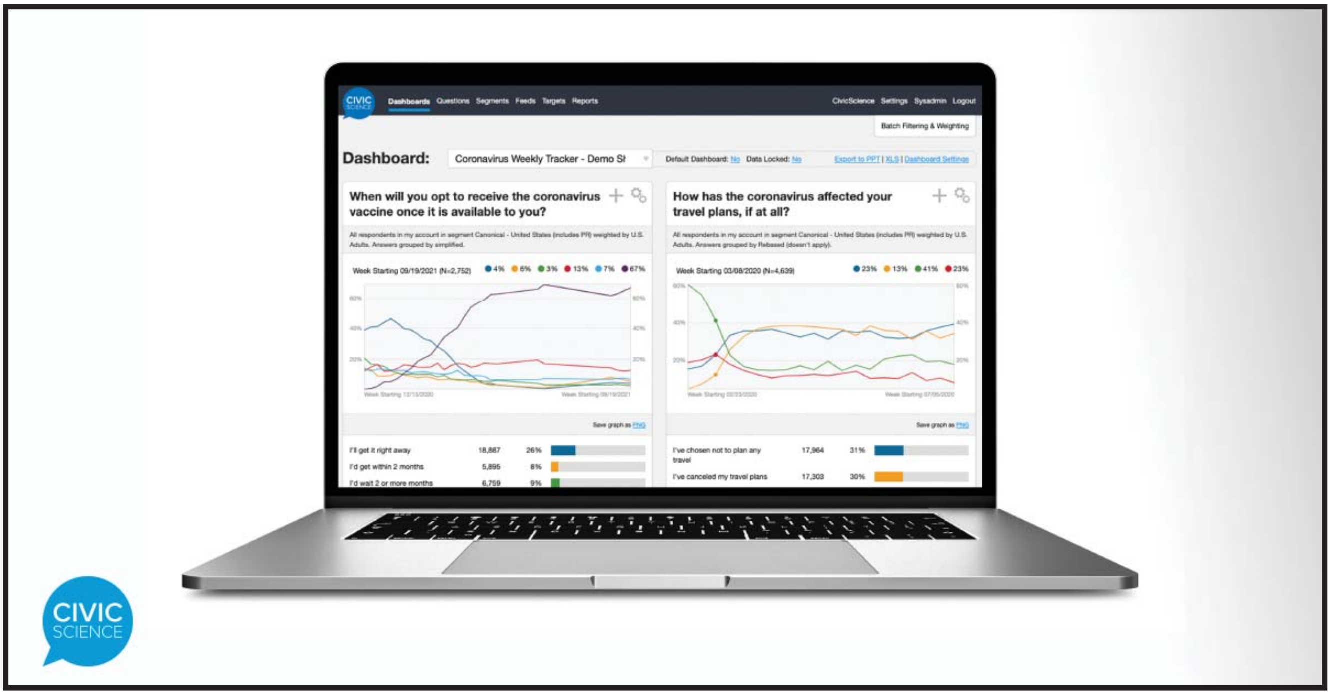
Whether it's analyzing transcripts from new research or mining historical transcripts, S+R AQuA™ uniquely blends keyword search, supervised machine learning, artificial intelligence and human empathy. We can line up themes and concepts to see where patterns emerge, look at how common ideas are framed to determine their true meaning, conduct sentiment analysis, put video next to themes to account for non-verbal cues (e.g., body language, facial expression, etc.) and more.



S+R AQuA™ sits atop a series of web APIs that efficiently move transcript data and provide analytics. Plus, the S+R Conversation Conversion Engine (CCE) - a blend of AWS programs and our own scripts – enables faster raw data upload and translation, providing a complete solution that gives us more complete, nuanced and insightful answers to important business questions.

Contact us at communications@shapiroraj.com to see how S+R AQuA™ can help you turbocharge insights with agility, leveraging the combination of artificial intelligence and human empathy.

www.shapiroraj.com



Improve your market prediction outcomes with The InsightStore

CIVICSCIENCE THE INSIGHTSTORE

Gone are the days where experiences, market fluctuations or separate industries stand alone. Our motto at CivicScience reflects the interconnection of the world: "Everything affects everything and everything's constantly changing. So, we study everything constantly." Market dynamics are just that – not static. Therefore, reporting that focuses on one niche of the consumer life, and is over six weeks old, is irrelevant for making business decisions now.

With inflation growing and a potential recession on the horizon, understanding micro-changes in customer sentiment, economic outlook and other realities that shift quickly is imperative to make informed decisions that give your company a competitive advantage.

Our insights enablement platform, The InsightStore, enables our partners to discover market and consumer trends before they grow and accurately predict future consumer behaviors and market outcomes.

CivicScience does this by gathering, ethically sourced, first-party consumer responses through our non-intrusive, innovative polling platform that sits on hundreds of mainstream media and news websites, collecting ~3 million responses a day.

Our scale allows us to ask and report on the findings of over 2,000 always-on, syndicated questions across all industries, cultural trends, topics and major brands, all with historical context. Our powerful platform enables our clients to add tailored ad hoc or tracking questions at any time, while enriching their data and insights to more effectively understand their consumer segments and optimize marketing and media plans for stronger outcomes.

civicscience.com/

Conversational research design principles brought to life on Rival, the world's best mobile-first market research platform

EXPERIENTIAL INSIGHTS POWERED BY CONVERSATION

Reach3 is a full-service research consultancy that develops scalable, conversational insight solutions for today's modern, agile enterprise. Featuring immersive, in-the-moment research designs, intelligent data sciences and dynamic digital storytelling, our approach delivers deep experiential insights that inspire action.

Our consultants are seasoned industry experts who uncover the insights you need to propel positive, powerful outcomes for your organization.

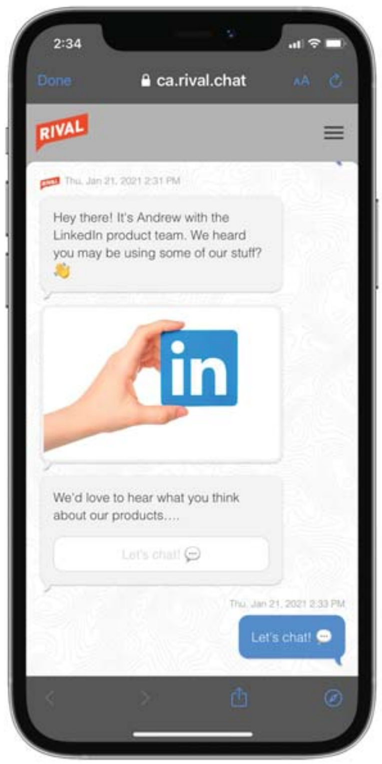
Welcome to the third wave of modern marketing research

Modern market research first moved online at the dawn of the millennium. In the 2000s, it evolved into highly formalized e-mail-based panels and DIY tools. Today, we're delivering deeper, richer and more actionable insights, at scale through modern mobile messaging services instead of e-mail; agile, on-demand, organic, immersive and conversational.

How we're different

Traditional research feels more like a test than a meaningful brand engagement – which is what people crave. Our proven process blends:

- Agile research methods: Connect with consumers in real time to uncover moments that matter most
- Sophisticated tooling: Harness the power of quant and qual methodologies through one robust system
- Mobile-first engagement: Connect with consumers where they're most comfortable sharing their thoughts and feelings
- Dynamic mobile reports: Shareable on-the-go insights for any type of stakeholder, with robust quant and qual all in one learning stream



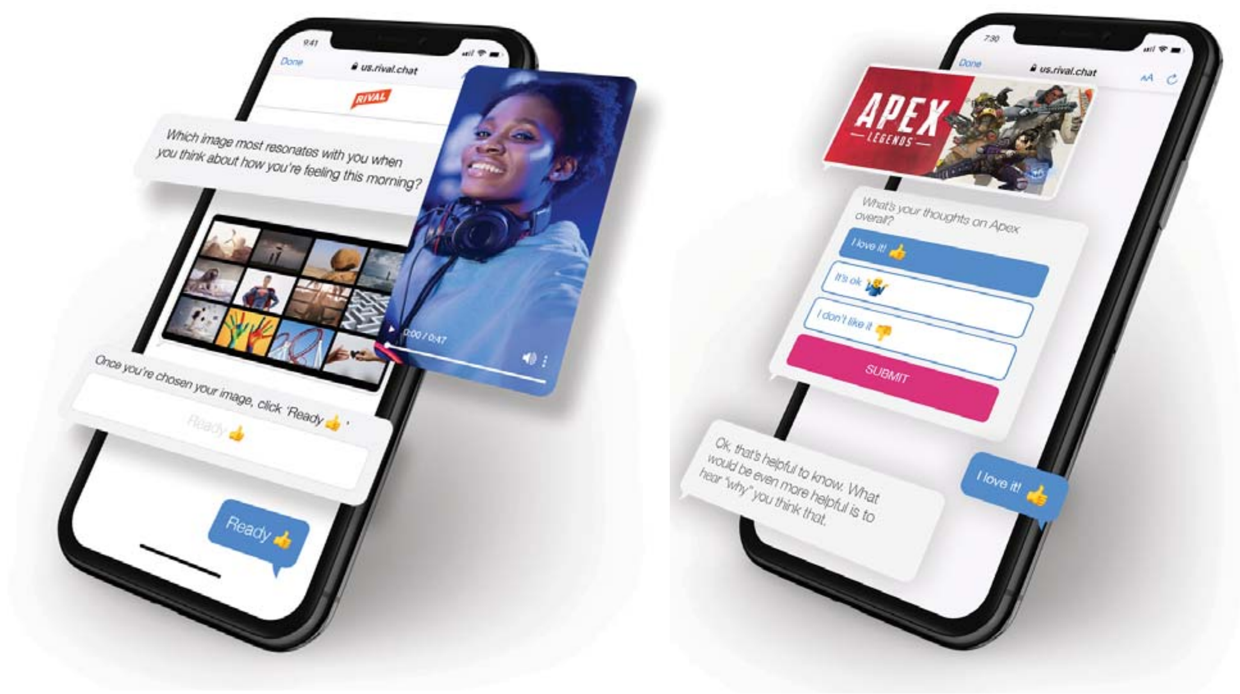
Rethink your research for the mobile-first generation

Reach3's approach leverages software from Rival Technologies, our sister company under The Rival Group. Rival develops voice, video and chat solutions that make it easy for enterprises to create mobile agile communities of customers, fans or employees that enterprises can continuously engage for insights.

Rival has revolutionized the insights community by employing conversational technologies that reach a broad range of demographics through SMS, social media and messaging apps.

Let's make the connection:
Reach3insights.com/contact-us
info@reach3insights.com

Rival and our sister company, Reach3 Insights are part of Rival Group Inc.



We invented the insight community, then revolutionized it

FRESH NEW VOICES ON A FRESH NEW PLATFORM: RIVAL'S MOBILE-FIRST INSIGHT COMMUNITY

Way back in the 2000s Andrew Reid and the team at Vision Critical introduced the concept of the insight community to the world. And you know what happened after that? Not much. Frustrated with the lack of innovation and imagination, Andrew created Rival Technologies; a mobile-first market research platform that has revolutionized the insight community experience for researchers and respondents.

Five reasons why Rival's mobile-first insight community is better:

- It's chat based. No app. Just the best of SMS and messenger
- No code-authoring canvas with super-sophisticated tooling
- Video available out-of-the-box for every activity at no extra cost
- Next-gen recruitment, mobile-first sample and panel management
- Media-rich mobile reporting
- Fully integrated into your CRM, CDP or marketing automation

And…

- Ongoing support from actual researchers and a seamless connection to Reach3 Insights – our sister, full-service market research consultancy

How it works: Researchers use Rival to engage consumers in real-time, on their mobile phones, in a way that feels organic, familiar and fun. By using chat, video and machine learning, researchers capture and share robust quantitative and rich qualitative feedback fast and effectively. Those insights can be fed directly to your CRM, CDP or marketing automation platform or shared with key stakeholders with real-time mobile reports.

While others collect data, you're uncovering insights that can be used to:

- Do your best work
- Inform the next best experience
- Streamline product innovation
- Optimize marketing automation
- Uncover white-space opportunities
- Deliver just-in-time insights to key stakeholders

Working with leading-edge brands like Paramount, P&G, Facebook, REVOLT TV and Samsung, we make market research more inclusive, accessible and relevant to your customers, your market and your stakeholders.

We make it easy to get started with no strings attached.
Connect with Jacquie and she'll show you how: jacquie@rivaltech.com

Rivaltech.com

Rival and our sister company, Reach3 Insights are part of Rival Group Inc.

Agile Research Platform

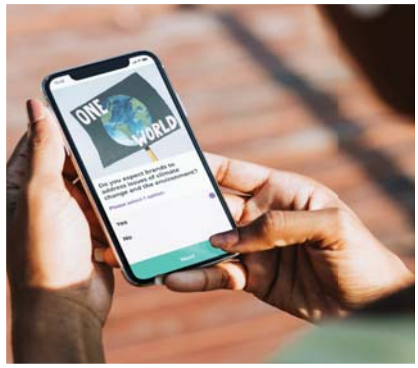
Eliminate market research obstacles with OnePulse

ONEPULSE PLATFORM

Question everything with OnePulse, the agile insights platform that helps you validate ideas and get the answers you need in minutes, not weeks. Turn research into an ongoing conversation by connecting with an always-on community of 600,000+ global consumers who are motivated and rewarded for sharing their honest opinions. Boasting an industry-crushing survey completion rate of 40%, dig even deeper into the "why" behind your data by re-targeting respondents as many times as you want.

With the OnePulse platform, you can eliminate traditional market research obstacles.

- **Quickly deliver critical information with confidence.** Build, launch and analyze survey results all in the same day.
- **Speak directly to the people that matter most to your business.** Create a custom target audience using 65+ demographic and lifestyle filters.
- **Keep a pulse on the opinions and actions of your audience at all times.** Monitor how your brand is perceived and track the purchase behaviors of customers.
- **Capture consumers' attention throughout the buyer's journey.** Verify that your creative assets resonate with your audience before launching your next campaign.
- **Become a consumer-centric brand.** Focus on what works by involving consumers early and often in the product development process.



What do you want to know right now? Start getting real answers from real people today by visiting OnePulse.com.

www.onepulse.com

Market Research Platform

Leaders in market research technology for a greater UX

QUMIND

"We get you closer to your customers to spark opportunities" is our mantra…but what does this mean?

QuMind offers you a unique perspective for DIY market research – an agile, feature-rich proprietary platform with a complete range of quantitative and qualitative tools, engaging dashboards, global sample and community hosting, all supported by managed services for a helping hand when you need it. All of this gives you deep insight into the lives of your customers – it's all there at your fingertips. And…it's a true one-solution platform – you'll never need any add-ons with unanticipated costs or experience the frustration of having to wait for external resources.

It means your team can be empowered to deliver the customer insight needed, when it's needed, to those that can take action – they'll be able to spark those conversations to develop a greater understanding into the lives of your customers. QuMind's platform is mobile-first and "always on" with no limits to what your team can do.

FMCG, financial, retail, manufacturing, publishing and energy are just a few of the industries we support. Reference our case studies at https://qumind.co.uk/case-studies/ to see how we've become part of a global market research phenomenon across a broad spectrum of business categories.

You'll save time, money, frustrations and you'll increase conversations with your customers, building true customer closeness at scale. QuMind is the market research tool you always wanted – then you'll see just what it means to get closer to your customers.

qumind.co.uk

The go-to source for high-fidelity data and valid audiences

DISQO'S INSIGHTS PLATFORM

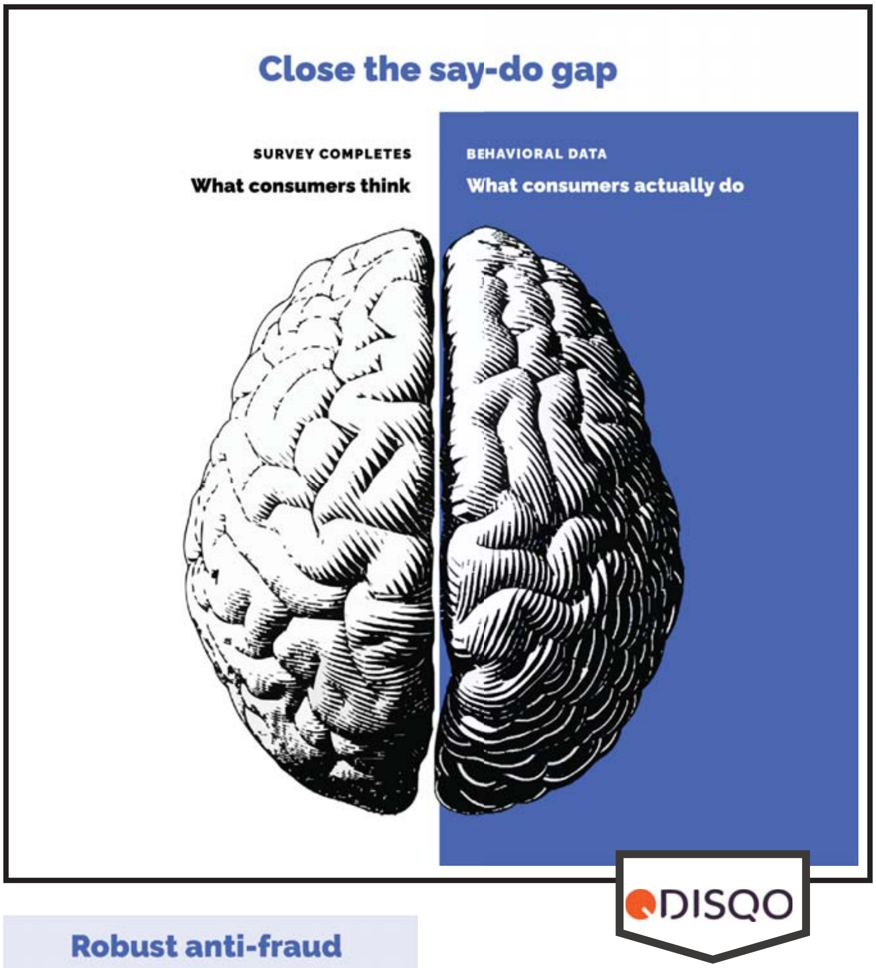
DISQO's platform empowers researchers and decision-makers to question, test and measure customer experiences with products, advertising and brands at remarkable speed. Brands, agencies and media companies can drive more value from first-party data investments by connecting with DISQO's zero-party consumer data, including rich demographic and interest profiles – and cross-platform digital behaviors.

An expanding portfolio of market research and advertising measurement applications is built on a fully consented consumer data platform accessible via API integrations, proprietary dashboards and a world-class, highly experienced client success team. With an API integration into DISQO's 100% proprietary audience, research clients reduce manual processes, avoid audience supply-and-demand challenges, minimize research fraud and support timely, confident decision-making.

Clients can also deepen insights by targeting research questions to desired audiences based on demonstrated behaviors – instead of relying solely on self-reported interests. Consider the power of being able to target questions to consumers who recently visited financial domains, watched streaming content, bought groceries with e-commerce retailers or spent ample time consuming video on Twitch.

Customer segmentation schemes can be augmented and validated for more effective activation across the enterprise, from product innovation to brand tracking. By incorporating behavioral data into studies, clients close the say-do gap and get ahead of their competition with more predictive insights.

Researchers need to trust their data sources to make the right decisions or the business strategies they support will fail to deliver against objectives. When data is contaminated by the actions of bots or other fraud, accuracy falters and decision-making is impaired. Misleading insights can cost companies millions in lost opportunities and wasted investments.



DISQO is a go-to source for market research firms and top sample providers needing access to valid audiences and high-fidelity data. DISQO's industry-leading anti-fraud measures include multiple defense layers made possible by 100% proprietary and direct consumer relationships.

"Researchers face supply shortages and quality challenges that are impacting the timeliness and validity of their studies. The timing couldn't be worse given the radical digital transformation of consumer behaviors which is reshaping markets. We're on a mission to empower clients with a platform that enables breakthrough insights they can trust to inform their critical decisions, so their businesses achieve growth and success."

– Ted Bouzakis, executive vice president of sales, research and insights

End-to-End Platform

Gain fast and trustworthy results through InnovateMR's Insights Products

INNOVATEMR TECHNOLOGY SUITE

InnovateMR is a fiercely independent sampling and ResTech company that delivers Faster Answers™ from business and consumer audiences utilizing technologies to support agile research. As industry pioneers, InnovateMR connects organizations with targeted audiences around the world and develops forward-thinking products to support informed, data-driven strategies and identify growth opportunities.

From our experience in research, we know there is a foundational shift occurring. The industry is seeing a growing need for better insights, compelling storytelling and trustworthy results, but researchers can't wait weeks or months for their answers. Businesses large and small are facing enormous pressure to innovate and pivot in a volatile, hypercompetitive market. To meet this demand, InnovateMR has developed a technology suite that combines the very best of our trailblazing ingenuity.

The Vision Suite™ is a comprehensive collection of next-generation insights products that empowers researchers to take even more control of their insights. It includes:

Agile survey-creation tools with templatized questions crafted by our research experts.

Engaged targeted survey participants from our proprietary B2B and consumer audiences in 27+ countries.

Precision field management tools including scheduled launch, real-time

alerts via text or e-mail and custom quota threshold settings.

InnovateMR's advanced fraud mitigation checks and tools including the American Business (Stevie) award-winning Text Analyzer™, evaluating open-end responses at scale.

Reporting analytics and global filtering functionality.

A do-it-together approach, with access to a network of experienced consultants and a team of Vision Suite technology experts.

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Mobile Survey Platform

Receive instant customer feedback with 1Q

KNOW NOW® WITH 1Q

1Q is a mobile research platform that arms brands with candid consumer feedback and real-time insights for just $1 per response. Get instant feedback from your target consumers. With 1Q, instant means instant. Not five days from now. Not five minutes. Your results start arriving within seconds of hitting the send button. You instantly get not only answers to your questions or responses to your media but also analytics.

1Q's platform advantages:

- Reach network of 1 million+ engaged respondents
- Advanced shopper targeting with unparalleled geo-targeting capabilities
- Recontact your respondents with 90%+ response rate
- No bots, no professional survey takers or fake users, rigorously validated proprietary survey panel
- No contracts or minimums required

In today's world, market trends evolve rapidly and brands are increasingly called upon to make product decisions and deliver marketing results more quickly. In response to this pressure, 1Q was created to provide a no-hassle, two-way mobile engagement platform where brands can reach their target audiences instantly.

Compared to other providers, 1Q offers more features, greater flexibility, lightning-fast results and an unparalleled user experience. Equally, our respondents get paid instantly, unlike other solutions that make them wait or accumulate points that never pay out. That's one reason our respondents are so loyal. Schedule a free demo now to learn more.

site.1q.com/

Qual that is high-tech and high-touch

HARK CONNECT'S QUAL TECH PLATFORM

HARK Connect provides the most advanced Qual Tech platform for online and in-person focus groups and IDIs worldwide. We offer a wide range of cutting-edge features including a virtual and secure client backroom with private chatting, real-time transcription, closed captions, simultaneous AI translations into 70+ languages, live transcript tagging and fast clip extraction for video reels.

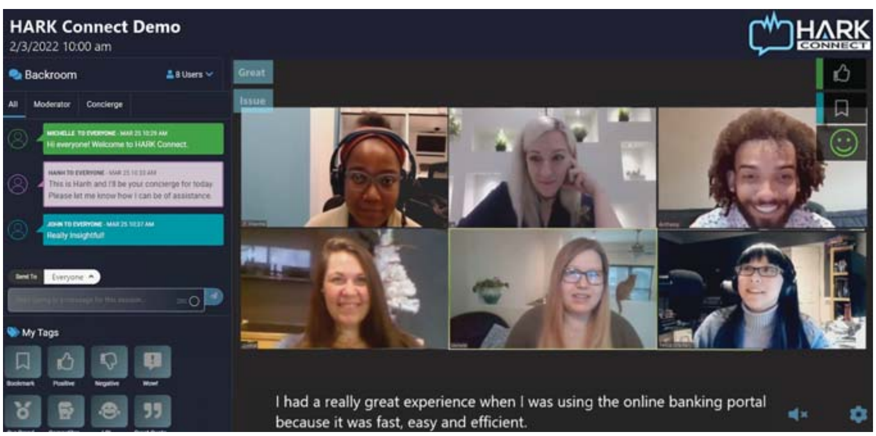
Additional expert qual services include recruiting, incentive management, multi-language moderating and analysis. We also offer a robust, proprietary national panel of over 100,000 consumers and state-of-the-art facilities in Chicago, Austin and New York.

High-tech

HARK Connect uses innovative AI to enhance qual researchers lives. We are the only service that offers automatic preselected tagging of key words and phrases, in addition to live-tagging if desired, to annotate your transcripts for easy searching of salient quotes and clips. We are also pioneering neuro-measurement applications for qual to be introduced Q2.

High-touch

Every session comes with a dedicated human tech concierge who is there to assist the moderator and clients. The HARK concierge sets up the session with all custom requests, hosts respondents, conducts tech checks, assists the moderator, if desired, showing setting up stimuli, conducting polls and stays with the session to answer any questions and help in any way.



Our philosophy

The HARK Connect philosophy is to leverage innovative technology and human support to make the qualitative research experience to be as easy, seamless and enjoyable as possible. We aim to make your experience efficient and stress-free. We also are committed to advancing qualitative research tools for deeper understanding and business shifting insights.

Developed by scientists and moderators

HARK Connect is a division of MediaScience known to the research world as being the leader in emotional measurement used by most major broadcast, digital and social media platforms/content providers. Setting out to make a better experience for our clients, HARK Connect was created using in-house developers and guided by seasoned qual researchers.

For more information: info@harkconnect.com

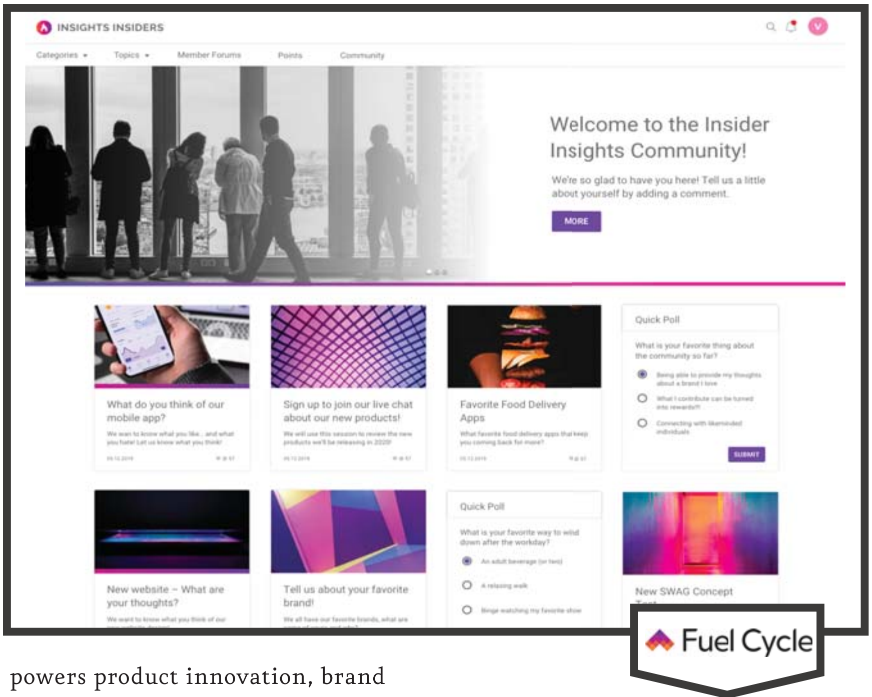
www.harkconnect.com

Community Platform

Maintain connections though comprehensive intelligence

FUEL CYCLE'S MARKET RESEARCH CLOUD

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.



www.fuelcycle.com

Sample Management Platform

The most effective panel management – that's ready for now and the future.

IMPROVE YOUR PANEL MANAGEMENT QUALITY

SampleNinja is changing the panel management game with cutting-edge features such as dynamic profiling for full panel hydration. Intelligent auto-sampling for ultimate in-project efficiency. Multi-panel environments with members apps, full recruitment tracking and ROI reporting.

Quality – SampleNinja ensures industry-leading quality at the core of every function in the panel management project process, integrity for your panels and your panelist as standard.

Security – Every possible integrity check is automatically integrated within the platform, so you can use panelists with confidence, with no gaming to manage yourself.

Versatility – Every single panel and sub-panel configurable down the individual item. Any look and feel, any rules, controls and incentives all in one neat interface set up to your liking.

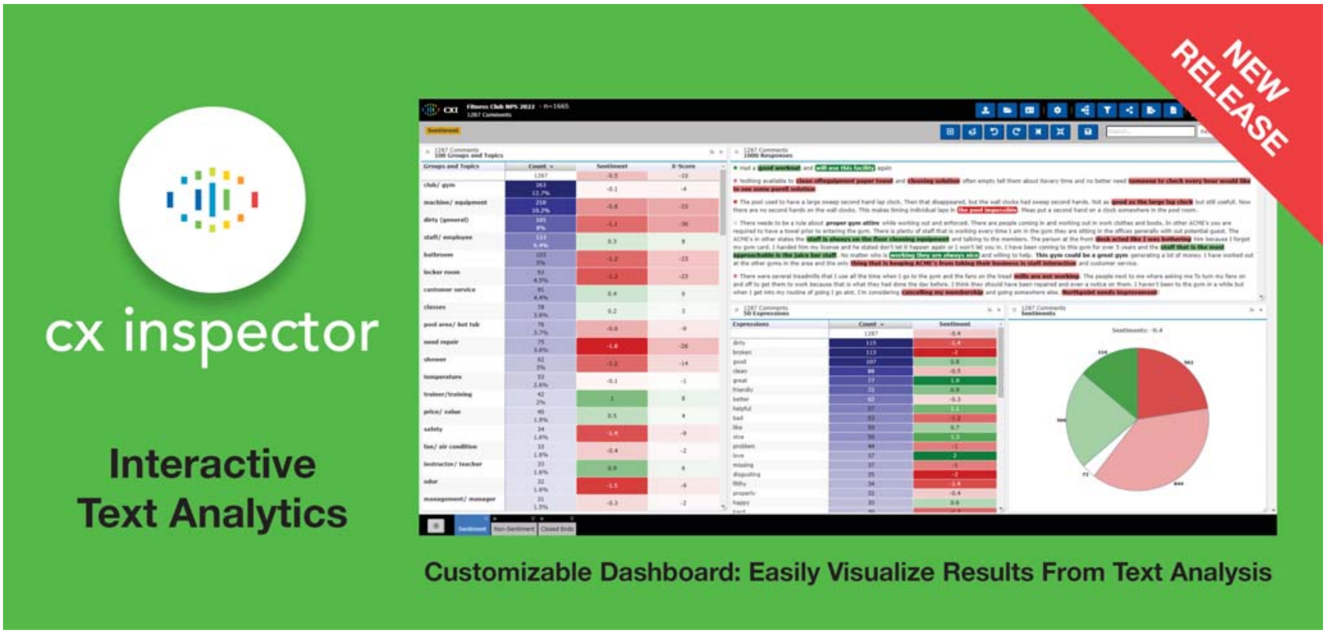
Scalability – No limits to the number of panelists, panels, sub-panels, recruitment questionnaires, projects or data points.

Speed – The build from the ground up with the latest AWS technology ensures a smooth operation for years to come. An SPA (single page application) platform which is fully open (an application API with 700+ endpoints) and a slick Google material design front-end to guarantee the easiest UX.

Breathe new life into your panel quality and bottom line.

Contact us for a demo sales@sampleninja.io

www.sampleninja.io



Uncover insights from open-ended responses quickly and easily

Do you have survey datasets with open-ended responses you wish you could analyze in minutes instead of hours or days? Most researchers do, whether from NPS, customer, user, employee experience studies or other research. While valuable information comes from analysis of structured, closed-ended data, analyzing the unstructured open-ended data is where the most powerful insights are found. Often, researchers don't have the time, money or right solution to analyze the open-ended responses at all, losing the opportunity to uncover valuable insights.

Easily analyze large datasets, visualize results and share insights in minutes

CX Inspector, Ascribe's fifth-generation text analytics software, quickly analyzes open-ended responses, creates customizable dashboards and easily exports results. CX Inspector can process thousands, even hundreds of thousands, of open-ended responses in minutes instead of hours or days.

Sentiment and topic analysis reveal key themes

CX Inspector, powered by the most advanced natural language processing and AI, uncovers key themes from sentiment and topic analysis, helping identify key actions to improve business results.

Interactive, customizable dashboard

CX Inspector's interactive and customizable dashboard helps easily explore the data and visualize the most important results. Create a dashboard with preferred visuals, then click to filter results by any variable such as a region, NPS score or negative sentiment. Create crosstabs or click through to find the individual responses on a given topic. Easily change visuals and even save dashboards for future use.

Import and export results easily

Easily import data, with the option to automate the data inflow for recurring studies. Export the results and dashboards to the platform of your choice to share quickly with other key stakeholders.

Outstanding training and support

Ascribe's experienced training and support teams help new users get up to speed on the software and ensure the results meet your needs.

Ascribe has helped researchers around the globe process open-ended comments for over 20 years. Come explore the new CX Inspector (https://bit.ly/3D8qWFT Link) and schedule a meeting to discuss your needs or request a free demo using your own data.

www.goascribe.com

cx inspector

Making qualitative analysis easier

ascribe

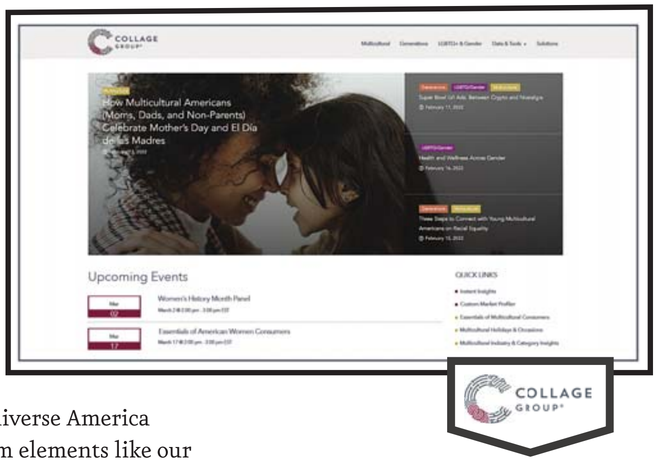
Cultural Intelligence Platform

Incorporate cultural intelligence to drive brand growth

COLLAGE GROUP'S CULTURAL INTELLIGENCE PLATFORM

Discover insights on American consumers across race, ethnicity, generation, sexual identity, gender and family makeup through Collage Group's world-class cultural intelligence platform. With the industry-leading method to assess how your brand and advertisements rank among diverse consumers, along with 70 million data points, 300+ studies and new data shared – three-to-four times per month, you'll be the first to visualize critical insights, get direct answers, win your target market and so much more.

Collage Group's approach to understanding America's cultural transformation is essential to your brand's success. We curate an unrivaled set of insights into diverse America through key platform elements like our CultureRate:Brand and ad rating system, consumer essentials research, Instant Insights and more. You'll dive deep into what works and what doesn't for engaging the attitudes, behaviors and values of diverse consumer segments.



Our platform enables us to continuously engage with America's top brands, align with their top priorities, discern their most-leveraged areas of research and develop the innovations that matter most to their success.

Unleash the power of culture to drive brand growth and find answers in our insights on America's diverse consumers with the tools and cultural intelligence trusted by more than 250 of the world's leading brands.

www.collagegroup.com

Market Research Intelligence Platform

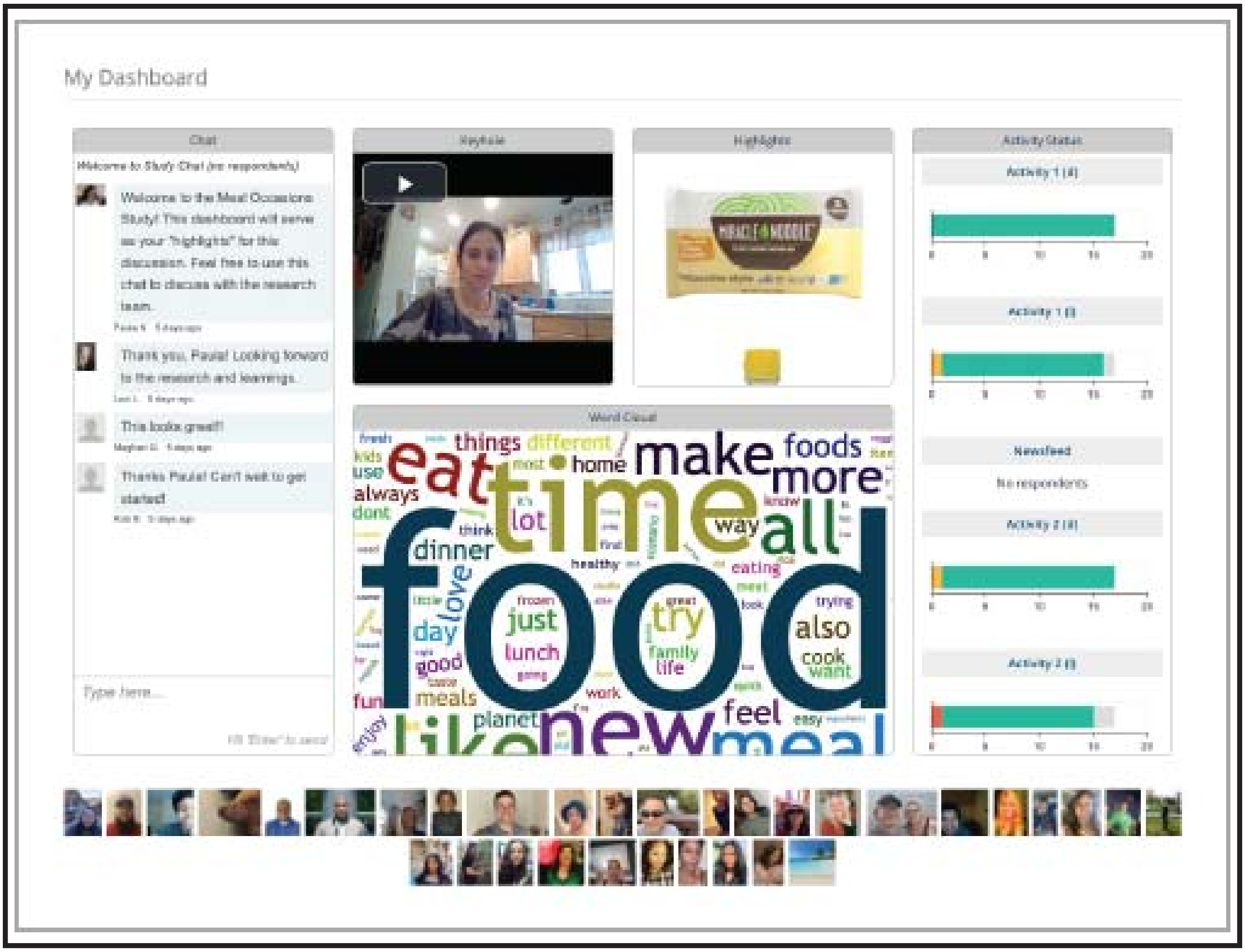
potloc

Potloc is an all-encompassing platform for market researchers to uncover highly accurate and niche B2C and B2B insights about their target markets.

As market research experts, Potloc launches customized surveys on social media platforms where over 4.6 billion users can make their voices heard. Because we are able to gather authentic responses, the quality of our data is unmatched. In order to make impactful business decisions, companies need to operate based on data they can trust, which is why we go above and beyond to ensure they're getting exactly that. To optimize our offering, we use comprehensive data-cleaning technology to detect any responses that could harm the quality of the collected insights.

Once the data has been thoroughly examined, we then present our client with an analytics module that allows them to dig deeper into our findings and expert analyses. Our ability to target niche markets and deliver clear, actionable insights in a timely manner is why we've managed to maintain an exceptionally high level of client satisfaction. As a result, many are repeat customers from all over the world, including those at Fortune 500 consulting firms and consumer brands, among others.

www.potloc.com



Aha! Insights Technology: The all-in-one online research platform

AHA! INSIGHTS TECHNOLOGY MARKET RESEARCH PLATFORM

Aha! Insights Technology is a leader and pioneer in the ResTech space. Our strategic asynchronous and live technology platform is the most comprehensive in the marketplace. Aha!'s broad suite of mobile and video-friendly tools allows researchers to create custom research studies that uncover and capture rich in-the-moment emotions resulting in amazing insights.

Key features include the first-ever global integration of Zoom with our Aha! Live Conversations™ platform for online focus groups and IDIs. It features our proprietary ClientStream™ which includes a secure corporate-friendly client backroom, live chat, auto-scheduling, alerts, transcription, tech checks and human monitoring.

TruRotation®, the market research industry's only algorithm-driven multi-day rotation concept testing tool, gives you 100% balanced concept exposure with absolutely no order bias.

Our multi-faceted Dynamic Canvas® projective tool allows you to create an infinite number of visual exercises including perceptual and brand mapping, concept testing, buyer journey tracking, as well as free-form strategic image and text-related exercises.

Aha! is also a licensed partner with QualtricsXM giving you access to at-scale quant and qual/quant hybrid studies.

We recently released several new advanced features and enhancements including additional moderating and analytic tools, a new data visualization dashboard and a major acceleration of data delivery.

Our skilled team also provides full-service study design, project management, recruiting and tech support. You can do it yourself or we can do it for you.

INSIGHTS TECHNOLOGY
FEEL. CONNECT. SHARE.

www.ahaonlineresearch.com

Survey Platform

Strengthen your insights through a collaborative experience measurement platform

SNAP SURVEYS SNAP XMP

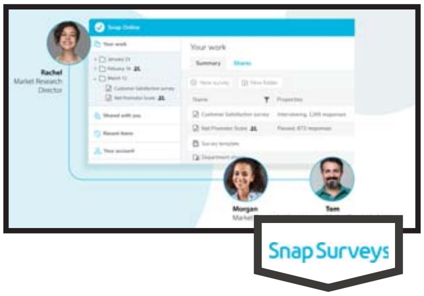
Insight and market research professionals rely on Snap Surveys for expert data collection and feedback management solutions to generate insights that drive action.

Snap Surveys offers Snap XMP, a collaborative experience measurement platform for survey design, data collection, feedback management, advanced analysis and customized reporting. Research professionals can create engaging experiences – surveys, forms, evaluations and more. Design for any survey mode – online, mobile, offline and scannable paper surveys – in any language.

Snap XMP empowers organizations to make smarter decisions backed by meaningful insights.

- Create surveys that engage. Reach anyone, anywhere, with any device, online or offline.
- Collaborate for a streamlined workflow. Agile teamwork brings your project to life.
- Generate customized reports and utilize built-in analysis tools for deep-dive analysis.

The platform is supported by a dedicated team of technical experts and training professionals. Snap XMP meets trusted data privacy, security and protection standards that you'd expect from a modern platform.



Should customers choose, the Snap Surveys projects team have the knowledge and expertise to take on any survey project to generate the results you need. From design and analysis to custom feedback solutions, the team will ensure your survey project is a success.

Snap Surveys offers trusted solutions, helping research professionals make informed decisions with confidence. Contact us to schedule a free live demonstration.

www.snapsurveys.com

Community Platform

Improve customer-centric business strategies

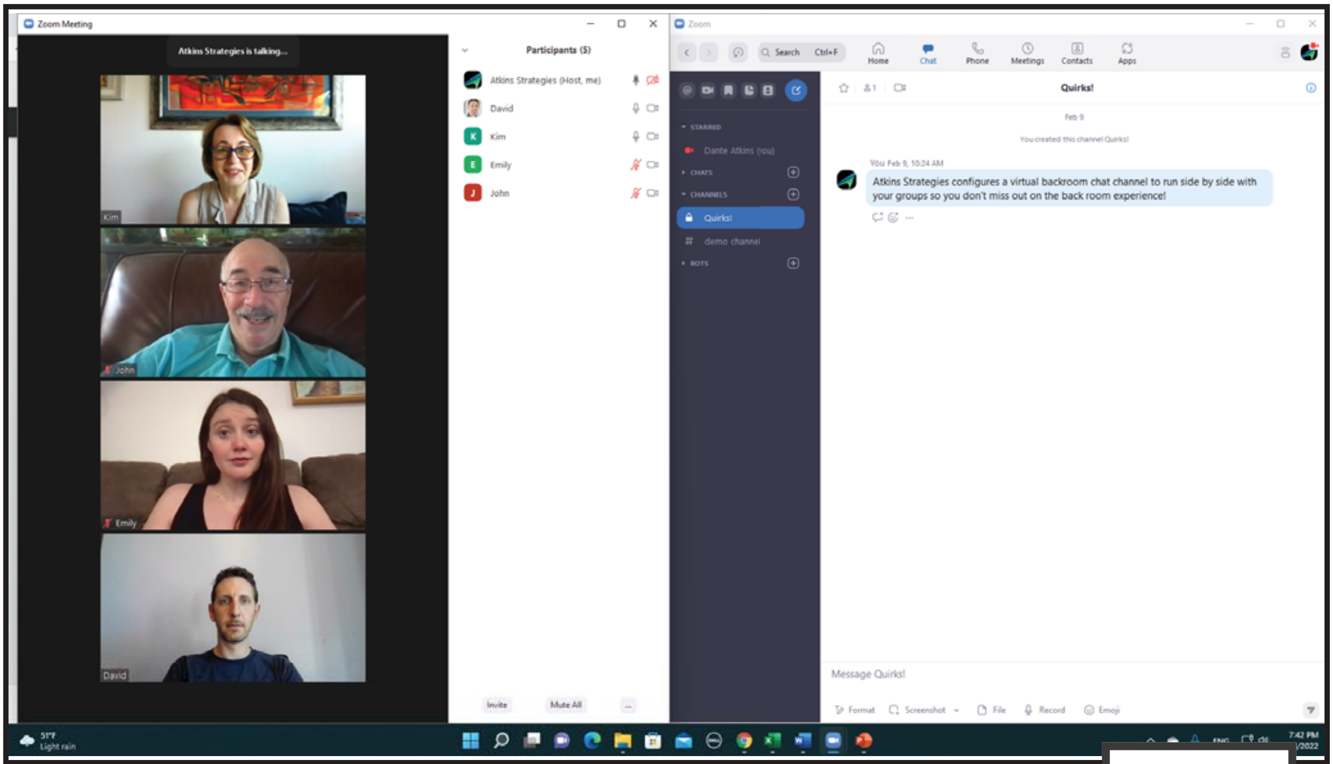
GONGOS' I°COMMUNITIES

As the insights cornerstone of the customer-centric organization, Gongos' i°Communities® empower customers as stakeholders and place them at the heart of business strategies. Communities serve as a critical strategic hub, connecting consumers with corporate stakeholders to infuse their voice across the entire customer-centric value chain.

Foundational to Gongos since 2006, full-service communities are a critical element of our DNA as an organization and we're operationalized to meet your full-service needs. We believe in providing consultative guidance throughout your engagement to help maximize your ROI on engagement.

Under our Customer as a Stakeholder™ service model, i°Communities are crafted to move beyond insight generation to drive decision-making and foster intra-organizational intelligence. Our belief is that individuals provide higher value when they feel valued. Therefore, organizations that truly activate on the customer-as-a-stakeholder imperative within online communities will reap the rewards of deeper insights that drive more customer-centric decisions. Our platform is built on four foundations: a la carte learning to real-time collaboration; feeding organizational intuition; an open ecosystem that maximizes think-time through workflow efficiencies; and humanization of insights that address EQ as well as IQ. We enable both custom qualitative and large-scale quantitative initiatives that allow for multiple products, brands, consumer segments and/or global regions.

www.gongos.com



Atkins Strategies introduces Online Qualitative Research Concierge Service

The COVID-19 pandemic has upended traditional qualitative research and forced focus group professionals who would prefer an in-person research setting to use digital methodologies. Unfortunately, online research technology providers can be very expensive, not very personal and often use platforms that the typical respondent may not be familiar with.

That's why Atkins Strategies has introduced the Online Qualitative Research Concierge Service. Led by Dante Atkins, a trained moderator and qualitative research professional with decades of industry experience, the Online Research Concierge is a way of affordably ensuring the success of your online research project. The service uses Zoom webinar technology to host online research sessions. This means that participants are usually already familiar with the technology. Participants can connect with a mobile backup in case a laptop or tablet connection fails, or if a mobile device is the best connection available. The service includes:

- Individual tech checks for all respondents (for English and Spanish sessions).
- Research host to present and display concepts so your moderator can focus on moderating.
- A backup moderator to ensure that your project won't fail if your moderator experiences a technical failure or internet outage.
- Recordings of your research project in both original language and with an interpreted audio channel, with availability no more than a few hours after the end of each session.
- A separately configured private chatroom to serve as a viewing room for you and your clients.
- Automated transcripts in both original language and interpretation.
- A .vtt closed-caption file (English sessions only).

For a small additional fee, the following services are also available:

- Personal rescreening to validate your respondents.
- Pre-programmed poll questions to quickly assess how your group feels about an issue without going around the room or raising hands.
- Subcontracting high-quality moderating and interpreting partners who are familiar with online technology and will make your project succeed.

Get in touch with us at http://www.atkinsstrategies.llc/qual or e-mail dante@atkinsstrategies.llc for more information or to get a customized quote for your project.

www.atkinsstrategies.llc/qual

Reporting Platform

Intelligence2day® from Line of Sight

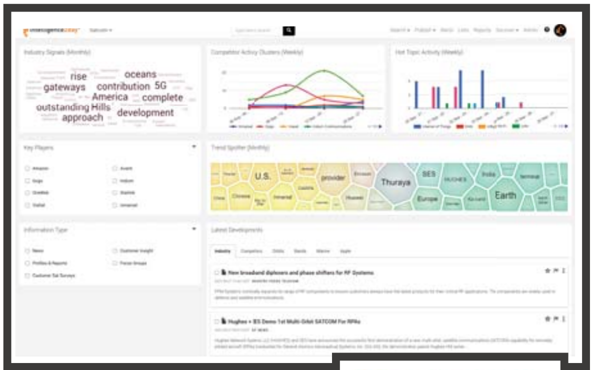
In a world that moves fast, you've got to run with it.

Gone are the days of relying on Google alerts and search engines to find the insights needed to make crucial business decisions. Information travels much faster and in different ways. To stay ahead, data is needed in real time.

The award-winning market and competitive intelligence software, Intelligence2day®, can transform unstructured big data into organized, digestible information for better decision-making.

With Intelligence2day®, businesses can automatically collect, discover, organize, analyze and share information and knowledge, focusing on any aspect of the competitive landscape whether it be customers, competitors, products, markets, technologies or trends.

Intelligence2day® has a wide range of solutions for market and competitive intelligence.



- Intelligence management can help you find relevant information fast – leaving more time for analyzing.
- Media monitoring can help you track and monitor news with efficiency, speed and scale that humans can't match.
- Early-warning radar can help you discover new opportunities and threats you're not already aware of.
- Insight generation will help you easily filter out golden-nugget insights by finding relevant and quality-controlled content.

Join the tens of thousands of users in more than 15 countries that rely on Intelligence2day® to transform their business with timely and insightful data.

Schedule a demo to learn more!

https://lineofsightgroup.com/
info@lineofsightgroup.com

Qualitative Platform

Improve your focus group quality with Live Labs

MERCURY ANALYTICS LIVE LABS

Imagine if executing online groups or IDIs was easy, with each detail handled for you. Imagine no long lead times – hold your group this week or tonight. Imagine your observers in a private chat room, advanced media and message testing available with real-time data visualization and a post-meeting analytics platform that gives you access to the meeting recording, a synchronized and searchable transcript and complete clipping capabilities. Imagine if this was all available at a great price.

Live groups made easy

An "always present" Live Labs facilitator manages tech aspects of the meeting's execution: moderators simply moderate.

Recruiting

Mercury's global recruiting capability connects you with an oversample of screened participants. We work with traditional recruiters or use your preferred recruiter. Recruits are 100% tech-ready.

Cool tool add-ons

Show videos, print images or messages and conduct advanced dial-tests, image heat-map tests or text-highlighting exercises with real-time data visualizations.

Observation backroom

Our Backroom connects observers, permits chats and allows precise note-taking with comments and notes time-synched to the meeting video.

Post-group – analytics workbench

Rapidly access the meeting video or a searchable, word-level synchronized transcript in 30 native languages with a clipping capability that lets you create amazing highlight videos.

Working with us: always rapid

Mercury's technology starts with our people. E-mail us for a demonstration/quote and our response team will reply rapidly with feasibility and costs.

www.mercuryanalytics.com/live-labs-online-focus-groups/

Boost Your Insights Engine's Power

How valuable is your research if your stakeholders can't find it and take action? Bloomfire's insights management platform allows teams to centralize, curate and share their research so stakeholders can easily access and leverage it to make informed business decisions. Leading brands are using Bloomfire as their insights engine: a platform for enabling research self-service for stakeholders, increasing the reach of their insights and amplifying the customer's voice.

Make all insights searchable

Insights teams have access to a wealth of research and data. As the sheer volume of information available to their organizations continues to increase, their challenge is figuring out how to navigate this content and get meaningful insights into the hands of decision makers in crucial moments.

Bloomfire addresses this challenge head on by giving organizations one centralized platform for their insights and making all content searchable. That means everything becomes searchable, from PowerPoint decks to words spoken in videos. Organizations can also integrate their secondary research vendors into the platform so that Bloomfire truly becomes a single source of truth. As a result, insights team members and their stakeholders can spend less time searching for insights and more time acting on them.

Increase research engagement

Bloomfire doesn't just make research and insights easier to find – it also encourages ongoing engagement so that organizations get more value out of their research and develop a data-driven culture. Capabilities such as a Q&A engine and post commenting encourage stakeholders to ask questions and provide feedback, while newsletters, e-mail notifications and integrations with Slack and Microsoft Teams help insights teams reach their stakeholders on the platforms they are already using.

Turn insights into a competitive advantage

Leading brands like Conagra, Regeneron and MetLife are already using Bloomfire to democratize insights and drive smart, customer-centric decisions. Learn more about how you can use Bloomfire to turn your insights into a source of competitive advantage at www.bloomfire.com

www.bloomfire.com

Receive reliable insights from reliable people at KLC

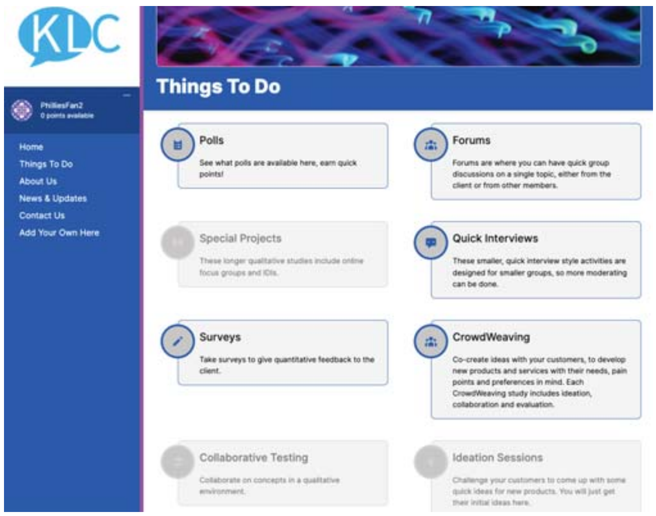
GOOD TOOLS, GREAT MINDS

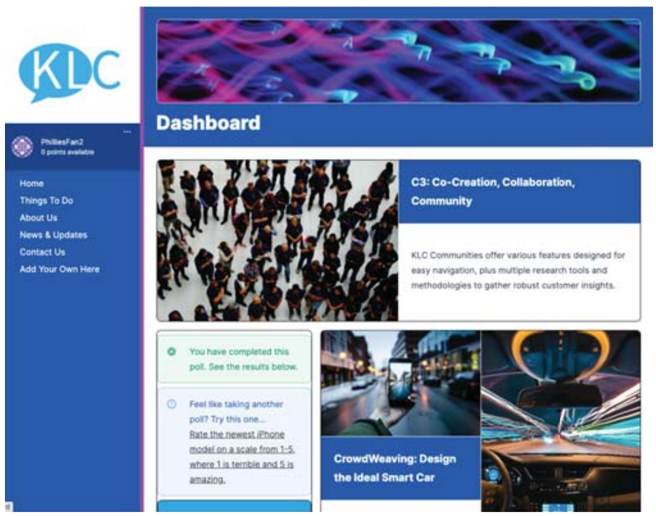
Our proprietary C3 community platform was designed by insights community professionals and delivers all the tools you would expect (and one you wouldn't) in a modern platform. We use the platform daily and we love it but it isn't the tool that makes us great – it's our people.

Today's brands need fast and deep insights to drive their marketing, customer experiences and innovation. They need the type of insights that only come from great minds working in a collaborative environment and they need to show a good return on their insights investments. That's what we deliver. That's why customers come to us – and it's why they stay. More than 90% of our clients renew with us, year after year, because we deliver.

KLC has been building insights communities for more than 20 years. You won't find a more experienced team to help you build a successful community – one that consistently meets your agile insights needs. Much of our team has more than a decade of experience with communities and several of us have been building and running successful insights communities from the beginning. Do you want to trust your community and your customers to anything less?

KLC ALWAYS-ON CUSTOMER WISDOM





All the tools you expect – and then some

Yes, we've got the tools too! Our platform's built-in suite of collaborative research tools were designed by researchers to maximize collaboration and enable the fast iteration only communities can deliver. Our tools include all the things you would expect plus our proprietary CrowdWeaving® technology for co-creation. CrowdWeaving® is a surprisingly affordable innovation catalyst and has been used by dozens of companies to build better products and better services.

Our overall suite of tools enables a variety of research activities to ensure most any research objective is covered. Activity types include:

CrowdWeaving® product and service innovation

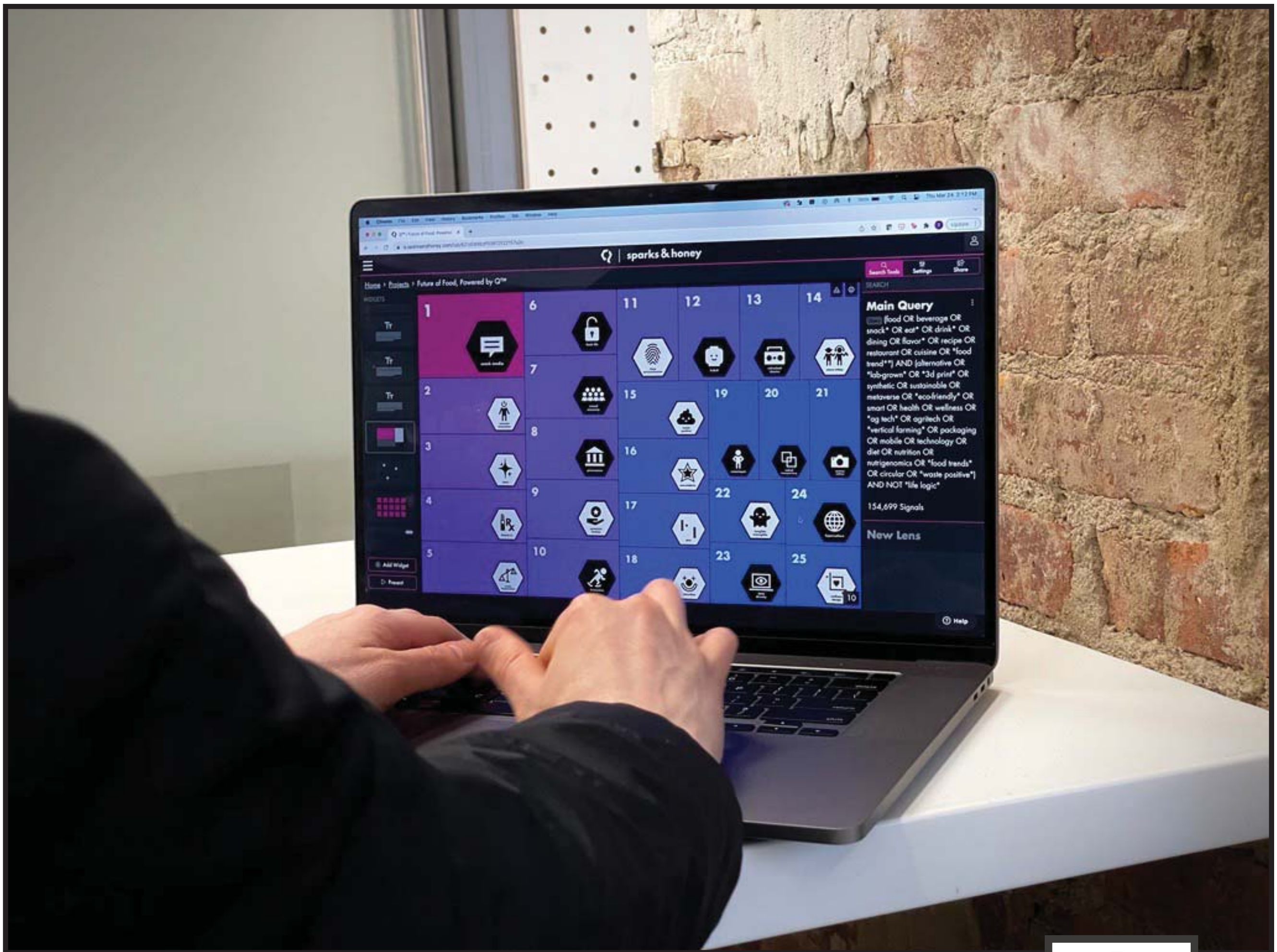
- Polls
- Surveys
- Forum Discussions
- Online Bulletin Boards
- Focus Groups
- IDIs
- Video Chats
- Video Diaries
- Photo Diaries
- Text Chats

See for yourself

We would love to show you how good technology and great people combine to make KLC the best option for your insights community.

Contact Information:
Dan Womack
President, KLC
Phone: 732 224-9991
Email: dwomack@klcommunications.com

www.klcommunications.com/quirks-22-form/



Discover, refine and impact with Q™

Q™ QUANTIFIES CULTURE

In today's rapidly changing landscape, businesses that track cultural shifts understand their consumers better, resulting in the ability to deliver exponential growth across innovation, R&D, marketing and business transformation. To put the power of culture in the hands of organizations, we built Q™ – an AI-powered cultural intelligence platform – to arm innovation and consumer insights teams as a pivotal platform in their tool stack.

Quantifying culture begins with a robust set of cultural data. Q™ ingests eight types of data sets including social, patent, startup and articles from 6,000+ global sources in 16 languages – 24/7. The combination of Q™'s proprietary data science, AI and human intelligence leads brands to discover big ideas, refine research and make cultural impact.

Discover

Predictive analytics. Inspire new ideas around existing products and get ahead of the competition by identifying disruptive, emerging trends in your category.

Use cases

- Innovation/R&D
- Identify future opportunities
- Long-term brand planning

Refine

Cultural zeitgeist. Get better results out of research by understanding which questions will resonate with your audience.

Use cases

- Primary research
- Concept/creative testing
- A/B testing

Impact

Global signals. Monitor how a new branding or creative campaign impacts the market – and iterate in real time.

Use cases

- Public relations
- Digital/social content
- KPI measurement

Learn more at the Q™ website and book your free demo to bring AI-powered cultural intelligence to your organization.

bit.ly/q-platform

Improve your customer insights through the tools Forsta's platform offers

THE FORSTA PLATFORM

Forsta gets you the data and insights you need to boost your business. Endlessly scalable and customizable – whatever opportunities are out there to find an edge on your competitors, you'll find them with Forsta.

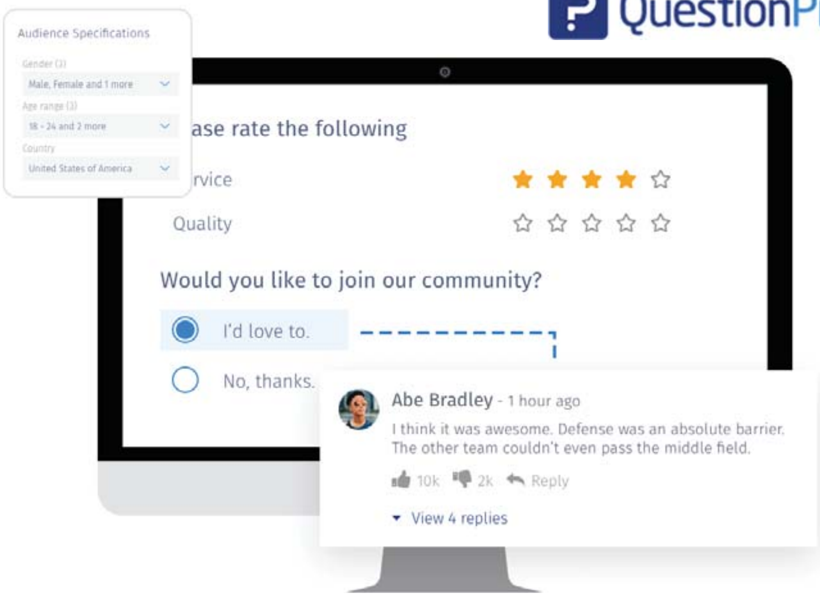
Forsta gets you deeper, more detailed data. It helps you find and visualize new insights and get them instantly to the people who can take action. It helps you solve the most important challenge of them all – how to grow your business.

Built by insight pros, for insights pros, the Forsta platform has the tools to tackle all the common (and uncommon) challenges of customer experience and market research professionals. If it's insightful it's measurable.

Interested in what Forsta can do for you? Request a demo to begin your journey to better customer insights: https://www.forsta.com/request-a-demo/

www.forsta.com

Full-Service Research Platform

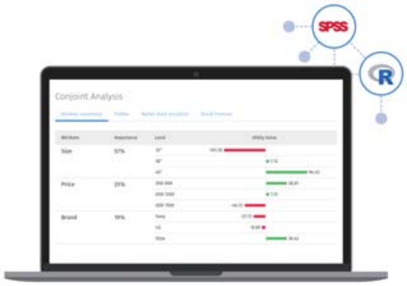


Market research platform to uncover complex insights that can propel your business to the forefront of your industry.

QUESTIONPRO'S ENTERPRISE-GRADE SURVEY PLATFORM

The market research space is seeing a lot of consolidation, innovation and newer research methods towards experience transformation. QuestionPro has always been at the forefront of the ResTech area to help customers, clients, researchers and organizations alike solve their biggest research challenges and get faster from data to insights.

Due to the mature product suite, which has the perfect mix of qualitative and quantitative solutions, over 10 million worldwide leading brands and academic institutions use QuestionPro to make a difference in their insights management and experience transformation.



An enterprise-grade survey platform, a community management platform for continuous discovery, an insights management platform for hyper-collaborative research, research services that act as an extension of internal teams and access to 22 million+ panelists, all within the same platform, make QuestionPro the choice of partner for everything MRX. Adding to this 24/7 support, value for money pricing, high ROI on research and contracts that work for you make it hard to look past this partner of choice for multiple brands.

From running UX studies to brand trackers, consumer research and pricing analytics, longitudinal tracking and continuous discovery, QuestionPro has helped brands get to insights 200% faster with engagement rates of over 55% per week.

Enterprise-grade survey platform

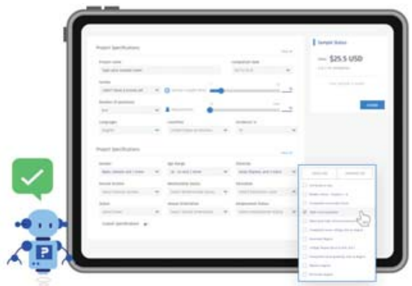
Access top research question types with simple but powerful features that make our research platform the most widely used market research tool on the planet. Our online survey platform includes custom point-and-click logic and advanced question types, including choice-based modeling questions, pricing analytics questions, a powerful suite of integrations to tie business and feedback data all with global, local and federal compliances and data centers close to you.

A community platform for continuous discovery

Conduct qualitative and quantitative research within the platform through surveys, polls, video focus groups with natural language processing, discussion boards and offer rewards. Manage a hyper-engaged community and co-create with your best promoters for longitudinal monitoring and continuous discovery.

Insights management platform – InsightsHub

Eliminate tribal knowledge from your research teams and empower CX, UX and MRX teams to do more with research they can build upon. Organize, explore, search and discover all your research data in one organized repository and turn data into insights faster with the unified data management tool.



Audience services

Leverage our full-service research teams to act as an extension of your internal research teams to propose the best research solutions, do the heavy lifting of your research and data analysis and let you focus on what matters most – the insights.

Panel services

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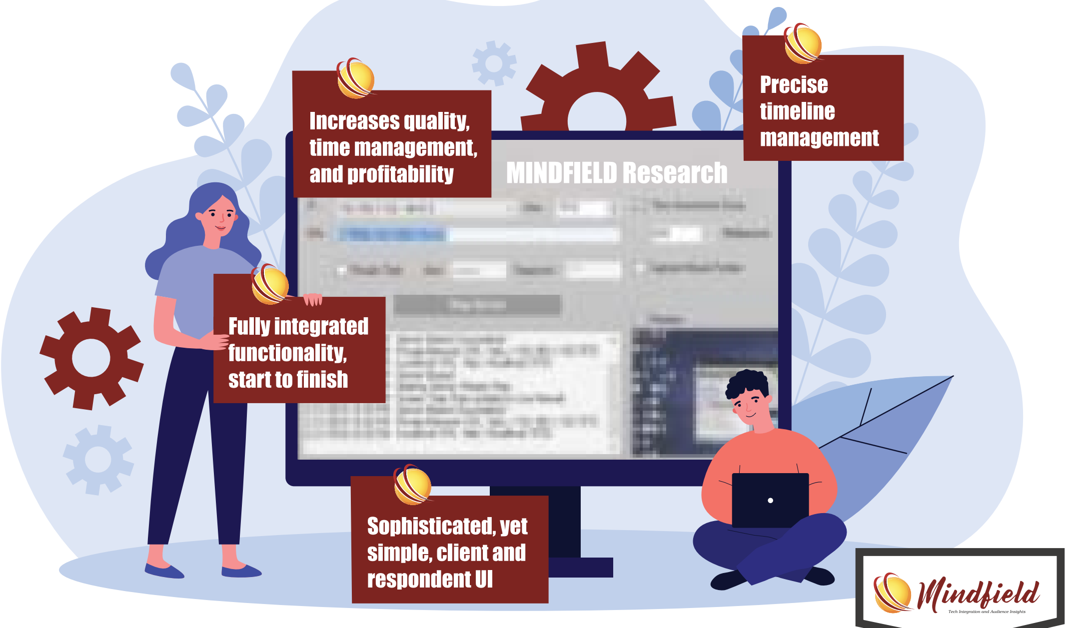

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"It's a game-changer," says a client in Cincinnati. Another longtime client in New York City says, "I have never yielded such high returns and quality data doing in-home research as I have since bringing Mindfield's tech options into our standard client offerings. Our business has dramatically grown as a result." Such high praise for a research methodology that has been around for years. Is there anything that revolutionary about in-home product testing? There is now . . . thanks to the experience-driven automation of Mindfield, manufacturers and industry elites consider the bar raised.

Gary McMillion, CEO of Mindfield, recalls doing the first IHUT research for trash bags, going door to door, taking hours for a single respondent. Today, Mindfield can recruit most studies in a matter of a few days across thousands of participants. The electronic process incorporates Mindfield's internet panel, Mindfield Online, along with the capacity to include a host of client- and industry-driven resources. All resources must pass a rigorous validation process that uses tech-like Experian Data Quality, Research Defender and Mindfield's own IQD real-time countermeasures. These collective resources mine the data and information provided behind the scenes to ensure real people are providing real, quality data. "Quality data is mission critical for us. Nothing else matters if the final product is not pristine," says McMillion.

Mindfield set its sights on locking down the full process for product testing. Manufacturers like to maintain anonymity of the products they are testing, so leveraging an electronic means to provide shipping capabilities to clients via the major carriers is vital. The electronic handling of shipping data also eliminates privacy and other industry security concerns. Mindfield's clients achieve the optimal process for their shipping requirements. Real-time delivery confirmation really matters to the success since usage periods and other research needs like first usage experiences, and more, are often captured. "Our clients need certain data and it's our job to ensure system-wide that we are making it happen," says Jay Mace, SVP of Mindfield.

Diaries and follow-up surveys are all delivered according to the client's needs and the best avenue for each respondent. Mindfield schedules surveys to be delivered at the proven, optimal time for each respondent or at times designated by clients and using the respondent-chosen method; SMS or text, app push, e-mail and more. Clients can even set a reminder protocol to the use the product according to the timing and other specifications required.

Much of Mindfield's electronic automation has been honed from client collaboration culled from 50 years of experience. "This has allowed Mindfield to create an IHUT platform that leaves no stone unturned," emphasizes Mace. "Our commitment to continuous improvement keeps us on the leading edge of technology. We understand that clients experience mediocre all too frequently, which is why we put so much flexibility and value into the Mindfield IHUT platform."

www.mindfieldtech.com

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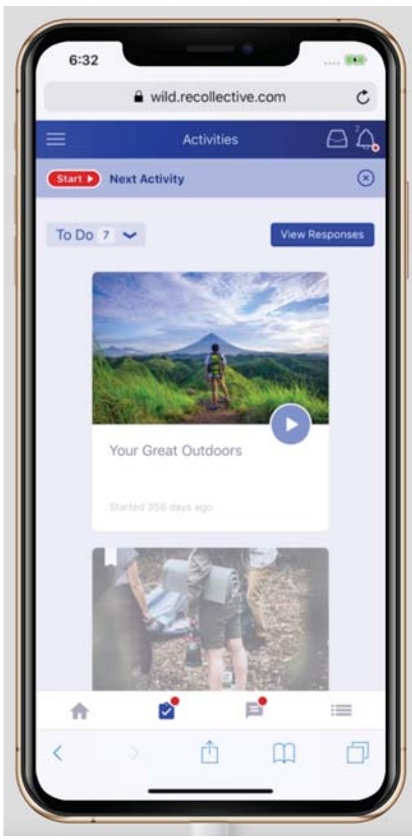
Easily create customized activities containing any number of tasks that can be open-ended text, photo upload, video (upload or webcam), poll questions, images to review and annotate, file uploads, card sorts and more. Sequence and track completion. Unique to Recollective, any response, discussion post, private message or comment can be excerpted online and saved verbatim. Each excerpt can be tagged with one or more codes defined on-the-fly, then annotated, charted and exported into a report. Participants can drop markers onto images or videos and leave detailed commentary to provide visual feedback. Choose from unlimited marker types, set how many markers need to be used and then review everything as heat maps, charts and data tables.



Create as many segments as you need and assign participants to as many as applicable. Combine segment data with custom profile fields/logic to automate assignment to Smart Segments then reveal activities or analyze response based on segment.

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MREF's 2nd Annual Race Around the World for Education will take place May 1 – 30, 2022!

Get your colleagues, friends and family together and get ready to walk, bike & run to raise funds to support educating marginalized children around the world. For the entire month of May our industry will come together in support of each other and a great cause.

Last year more than 1,100 participants and 35 sponsors raised $100,000 and logged more than 75,000 miles.

Will you join us in 2022?

Visit MRGivesBack.org to become a sponsor, register a team or individual and learn more about this year's beneficiary, Baal Dan Charities.

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

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

OUR MISSION

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

MRGivesBack.org

RACE AROUND THE WORLD FOR EDUCATION

MREF Marketing Research Education Foundation

IN FOCUS

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

// Survey Monitor

••• family research

Fueling family FOMO?

Images in ads, social media can stoke baby fever

What exactly motivates people to have children? Over time, researchers have attributed it to reasons like biological drive, social pressures and emotional fulfillment. But according to a recent study from the UBC Sauder School of Business, advertising and social media should be added to that list. The study, "Baby fever: Situational cues shift the desire to have children via empathic emotions," was published in the Journal of Experimental Psychology.

The research team found that viewing positive parent-child images, like going to the park, having dinner, drawing, taking fun trips or playing with their children, reliably boosted young adults' desire for their own little bundle of joy. This response is mostly driven by people's empathic emotions.

Notably, viewing negative parent-child images, like children drawing on walls, crying, fighting with siblings or having a meltdown on an airplane, did not have much of an effect on people's desire to have children.

"Advertising and social media play an important role in how we view the world. In general, what we see on Instagram and Facebook are positive portrayals of parenthood, with #blessed and #bestkidsever. How often do we see parents post #mykidsareterrible?" says study co-author and UBC Sauder Associate Professor Lisa Cavanaugh. "We wanted to see if, by simply showing pictures of kids in advertising, we could affect the desire to have children."

In a series of four studies, researchers observed a total group of 1,093 young adults between the ages of 18-35, none of whom had children. Some participants were shown advertisements with positive parent/child images and others were shown versions of the same ads but with the child removed.

Researchers found that young adults who viewed the positive parent-child images had a 22 percent stronger desire to have children than those who viewed the neutral images (i.e., the same image but without a child). They also reported significantly greater empathic emotions (such as tenderness, compassion, sympathy, caring, affection) after viewing the parent-child images.

A second study looked at the response that viewing negative images would have on people's desire to have kids. In this study, participants were divided into three groups: one that looked at positive images, another that looked at negative images and one that looked at images of only the featured products.

Those who viewed the positive parenting images experienced that same boost in their desire to have kids of their own but those who saw images of misbehaving kids with frustrated parents did not see their desire wane. In fact, the negative portrayals of parenting didn't have much effect at all.

"These are people who don't yet have children, so it could be they see the comedy in kids behaving badly. When it's not you trying to clean up the mess or get a child to eat before you go to work, it can be humorous," says Cavanaugh, who co-authored the study with S. Katherine Nelson-Coffey of Sewanee: The University of The South. "But we can say with certainty that people without children who saw these negative parent-child moments were not dissuaded."

The researchers also found that the effects were far from fleeting among those who felt the increased desire to have kids, as these empathic emo-

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••• shopper insights

Not so fast

Even as COVID-19 wanes, pandemic shopping habits endure

While consumers appear eager to move on from COVID-19, pandemic-related shopping habits remain firmly in place, according to a report from sales and marketing services provide Acosta. The report, The Lingering Impact of COVID-19 on U.S. Shoppers, examines U.S. shoppers' behavior nearly two years into the pandemic and finds that most of today's consumers (68%) are currently shopping online for groceries, at least occasionally, as both the pandemic and economic outlook continue to evolve.

"It is no surprise that shopping behaviors developed at the start of the pandemic are still in place today, especially since concerns surrounding COVID-19 remain high for many consumers," says Colin Stewart, executive vice president, business intelligence at Acosta. "In fact, Acosta's research shows pandemic-related concern levels among consumers in January 2022 were only slightly lower than those of consumers' surveyed about a year ago. Ongoing worries over safety and finances are compounded by product shortages and rising grocery prices resulting from supply chain challenges. While faced with the market's continued uncertainty, consumers are likely to stick with – and possibly increase – shopping habits picked up over the past two years."

Pandemic concern levels remain relatively high among today's shoppers. The average concern level of consumers surveyed in January 2022 was 6.6 on a scale of 1-10 (1 being not at all concerned and 10 being extremely concerned), up .7 points from December 2021.

Forty-six percent of consumers surveyed in 2022 rated their COVID-19 concern level as "very concerned." Twenty-four percent of consumers surveyed in 2022 rated their COVID-19 concern level as "not very concerned." Nearly 33% of households are in a worse place financially in 2022 than they were before the pandemic.

Shopping behaviors that developed during the pandemic are still in place for many consumers today, with 68% now shopping for groceries online at least some of the time, versus 40% of consumers surveyed between December 30, 2020, and January 4, 2021. Seventy-five percent of consumers surveyed in 2022 continue wearing face coverings while shopping, even when not required.

Thirty-one percent of consumers surveyed in 2022 continue stocking up on some products, particularly paper products, canned goods and meat. Twenty-two percent of consumers surveyed in 2022 continue using online subscription services. Today's shoppers also continue to feel the impact of increasing product shortages (60%) and higher grocery prices, especially for meat and dairy items (94%).

Fifty percent of today's shoppers say they have dined in a restaurant over the past month and 57% say they intend to do so again soon. Fifty-four percent of diners say they are noticing higher menu prices (up more than 10 percentage points from diners surveyed six months ago) and seem to be less aware of limited menus, staff shortages and ongoing safety measures.

Data for the report was gathered via online surveys using the company's proprietary shopper community, conducted between January 25-27, 2022.

tions and aspirations to have children remained high even three days after seeing the images.

"That may not sound like a big deal at first but consider the constant drip of images in our social media feeds. People are regularly seeing images of their friends' kids along with plenty of celebrity parent pics posted on social media and the effect could accumulate over time," Cavanaugh says, noting how fascinating it is that, for young adults of childbearing age, their desire to have children could be measurably affected by something as simple and common as advertising and social media posts – especially since it's a decision with such significant consequences for themselves and for society.

••• nonprofit research

Giving of my time – but on my terms

Donors seek control when they volunteer

Donations of both time and money are key to the success of nonprofit organizations such as charities and political groups. And although nonprofits typically favor receiving financial gifts, past research has found that donors' preferences are often just the opposite: They like to give their time more than they like to give their money – even when donating time does less good for the cause.

New research from the University of Notre Dame delves into the underlying psychology of this phenomenon, identifying a previously unexplored difference between time and money, which helps to explain the preference.

Donors feel more personal control over how their time (versus money) is used, according to "Why are donors more generous with time than money? The role of perceived control over donations on charitable giving," in the Journal of Consumer Research from John Costello, assistant professor of marketing at Notre Dame's Mendoza College of Business, along with Selin Malkoc from Ohio State University.

The study found that asymmetrical perceptions of control over donations drive donors' propensity to give more time than money. The authors also found that if charities can increase people's sense of control over their donation, this asymmetry can be eliminated.

"We identify several ways to increase donors' perceptions of control in our paper, but one straightforward approach is by giving people a choice about how their donation will be used," says Costello. "Decades' worth of research in psychology and consumer behavior finds that choice is one of the most dependable ways to increase people's perceptions of control. We find that this strategy is more impactful for money donations than time donations and thus eliminates the time/money asymmetry."

The research involved seven studies of more than 2,700 participants. Some were conducted online while others took place in a behavioral lab.

"Because potential donors feel more personal control over their donations of time, we find that leads them to be more likely to agree to donate and to donate in greater amounts," Costello says. "We find support for this prediction across a number of studies through measurement and manipulation of perceived control, while also ruling out a variety of alternative explanations."

That donors prefer to give time rather than money surprised the researchers, given a consensus among both academics and practitioners that donating time is less efficient for both the donor and the recipient.

"I think many people assume that donation decisions are almost exclusively driven by purely altruistic motives," Costello says. "For example, how much their contribution helps the cause. While these clearly play a key motivational role, our work shows that donation decisions are also impacted by the donor's own psychological needs, specifically the desire to feel control over their actions."

While past work has revealed a general preference to donate time, this study is the first to identify several situations where this is not the case. Notably, the preference to donate time can be eliminated when donors have a choice about how their donation will be used.

"On the other hand," Costello says, "we also find that donors will become much less interested in giving their time and no longer prefer it to money when they expect that the charity will have complete control how their time will be used."

The researchers designed and tested several strategies that can be used by nonprofit organizations to generate donations more effectively. "Charities may need to consider different strategies when soliciting time versus money," Costello says. "Past work has shown that giving donors a choice of how their donation is used can increase donations. However, one of our studies shows that while this is true for monetary donations, it is much less impactful for donations of time."

Adopting changes to marketing language can also be used to increase perceived control and donations for money, which typically lag behind those of time. "We find that asking donors to 'spend' their money rather than 'give' their money in donation appeals leads to greater perceptions of control over that donation," Costello says. "While 'give' is more commonly used by real charities, we find that 'spend' is more effective in generating monetary donations.

"With regard to volunteering, charities must certainly impose some restrictions," he says. "However, our findings suggest that those organizations wanting to increase volunteering should take whatever steps they can to minimize the donors feeling like their donated time is controlled by outside forces."

••• financial services

Inflation up, confidence down

Americans struggle with rising prices

With headlines announcing that inflation has hit a four-decade high, an Ipsos poll conducted on behalf of BMO Harris Bank has found that Americans' financial confidence has taken a hit as they feel the pinch in their pocketbooks. The BMO Real Financial Progress Index has shown a steady decline in American's financial confidence since the middle of last year and is down three points from year-end.

While 75% of all Americans say they feel confident about their finances, this falls to 65% for Gen Zers (those aged 18-24), a figure that has declined 10 points from the previous quarter. Alongside falling confidence, the data shows rising anxiety: 81% of Americans indicate they are anxious about their finances, with family related expenses (69%, +5 pts), keeping up with monthly bills (62%, +3 pts) and fear of unknown expenses (84%, +3 pts) placing the greatest pressure.

While the aggregate data depicts the struggle many Americans are facing, the challenges posed to Gen Z and Millennials are particularly prevalent: 93% of Gen Z are anxious about their overall finances; 80% of Gen Z are anxious due to family related expenses; 82% of Gen Z are anxious due to keeping up with monthly bills; 88% of Gen Z are anxious due to fear of unknown expenses.

Despite these feelings of anxiety and a decline in confidence, perceptions of being able to make financial progress are relatively stable, although young Americans show somewhat sharper declines than the national average: 46% of Americans agree they are making real financial progress, -2 pts from the previous quarter; 48% of 25-34-year-olds agree they are making real financial progress, -5 pts from the previous quarter; 50% of 35–44-year-olds agree they are making real financial progress, -4 pts from the previous quarter.

In line with being a main cause of anxiety, three in 10 (31%) Americans cite keeping up with monthly bills as a key barrier to making financial progress. Mirroring the other trends in the data, the stress of monthly bills is higher among Gen Z (40%) and Millennials (39%).

These are the findings from an Ipsos poll conducted from January 7-28, 2022, on behalf of BMO Harris Bank. For the survey, a sample of 3,400 adults ages 18 and over from the continental U.S., Alaska and Hawaii was interviewed online in English (including n=300 oversamples in Chicago, Indianapolis and Milwaukee).

••• b2b research

Omni's OK

B2B firms sold on selling through multiple channels

B2B companies had to quickly pivot to virtual selling options during the early days of the pandemic and as time has passed, they've grown more confident in their new sales models, MarketingCharts reports. New research from McKinsey suggests that this confidence is a result of companies increasingly offering various interaction points, arguing that "omnichannel is more effective than traditional sales models alone."

The results of McKinsey's latest B2B pulse survey – fielded among 3,360 decision-makers in 12 markets – certainly draw a link between omnichannel selling and market share gains. For example, while 46% of respondents using a single channel to sell products and services reported an increase in market share of at least 1 percentage point versus peers during 2020-2021, that figure increased with each successive number of channels used. As such, 72% of respondents that enabled purchase over seven channels reported market share growth.

The meaning of omnichannel has changed over time, too, as the bar has been set higher and higher. Today, B2B customers report using 10 distinct channels to interact with suppliers over their decision journeys, up from an average of 7.5 in 2019 and five in 2016. New channels that are being used now include mobile apps, video conferences and web chats, among others.

Another interesting finding is that B2B buyers are almost evenly split in their ways of interacting with sales reps. At the earliest stage of the process – identifying and researching new suppliers – 34% opt for digital self-serve, while 33% choose remote human interactions and 33% traditional interactions. Likewise, this near-even split is seen among buyers when considering and evaluating new suppliers. Not too surprisingly, during the ordering and reordering phases, there is a slight tilt towards digital self-serve and away from traditional interactions but even in these cases, at least 30% of buyers choose the traditional methods.

As one might expect, B2B buyers gravitate a little more to certain methods than others depending on the type of purchase they're making. For a first-time purchase, buyers tend to favor traditional methods over remote or self-serve and the same is true for higher-value purchases and more complex purchases.

By comparison, self-serve is the preferred interaction method for lower-value purchases and less complex ones too.

What experiences are required for customer loyalty? McKinsey outlines five, termed "must-dos" and said to be wanted by buyers in combination. These critical attributes are: a performance guarantee (full refund; essential for 78% of buyers); product availability shown online (74%); ability to purchase from any channel (72%); real-time/always-on customer service (72%); and consistent experience across channels (72%). For each of these, without being offered, at least seven in 10 would look for another supplier.

Other essential elements include outcomes-based pricing (70%), readily available customer reviews (69%), shipping within two days or less (64%) and a single log-in/password for all supplier sites and apps (63%).

In other findings: 72% of B2B companies that have built their own marketplace report market share gains over the past year, compared to 42% of those who say they will never consider building a marketplace. B2B companies with a greater degree of marketing personalization are more likely to report market share gains than those with a lesser degree of personalization. Twenty-nine percent of B2B buyers surveyed in December 2021 reported a willingness to spend more than $500,000 on a single interaction on remote or self-service channels, up from 25% in February 2021, with that change coming from an increase in the percentage willing to spend between $500,000 and $5 million.

The results are based on a December 2021 survey of 3,360 B2B decision makers in 12 markets: Brazil, Chile, China, France, Germany, India, Italy, Japan, South Korea, Spain, U.K. and U.S.

'Can you hear me now?'

| By Kaylor Hildenbrand

snapshot

Thoughts on the value of letting respondents know we are listening to – and hearing – them.

It's embedded in our memories as a marketing campaign for a well-known wireless company – the query, "Can you hear me now?" I think, however, that the tagline speaks to more than just cellphone coverage.

The need to be heard and acknowledged, perhaps validated, is everywhere in society. The digital age in which we live makes it more obvious and yet it is a deeply human trait.

We tweet and we post and then . . . we wait.

If a tree falls in the forest and there is no one around to hear it, does it make a sound?

It's a common philosophical question.

If we tweet and post and revise our profiles and yet receive no retweets, no "favorites," no likes, no followers – do we exist?

As a qualitative researcher, I have watched the industry evolve. Where we used to conduct research face-to-face (and still do), with increasing frequency we now ask people to post commentary to online bulletin boards, to upload videos and to complete similar almost anonymous tasks all in an effort to gather their perceptions, to peer into their world. Technology allows us to do more with less and takes us places we might otherwise never go.

Not long ago, I completed an online study, video ethnography, and it hit me that here I had real people spending their time and effort sharing a lot of information with me and the only feedback they likely received (other than the incentive check) might have been an auto-generated response through the platform, "Your submission has been received." I began to think they might have wondered whether their video was helpful, did they answer my questions, did they do a good job? Did anyone watch their video? Did anyone hear – and value – what they had to say?

I recently learned that a well-known television personality who has conducted more than 3,700 interviews with presidents, CEOs, celebrities and the like said that after the camera stopped rolling, nearly every time, no matter how polished the individual, her interviewee would ask, "How'd I do?"

There is an intrinsic human need for validation.

As a researcher, we are trained to never offer an opinion on a person's response. That's a given. Yet I believe there is tremendous value in making sure each person who participates knows they have been heard and that what they had to say, whatever it is, matters. In face-to-face conversations, it's easy. A smile, a nod, an "I hear you." I remind others in a group conversation to remember to focus our attention on the person addressing the group. I don't let people get away with saying, "Yeah, I agree with what he said." I ask that person to respond to me in his or her own words. It gives them power and reassurance. It encourages them to share their unique voice.

Technology gives us fantastic tools and yet it can sometimes create a wall between us. We must remember that there is a person on the other side. And on a human level, we desire – we need – engagement.

The digital age already in play and, recently accelerated by the pandemic, facilitates communication from a functional perspective, yet does it facilitate understanding? COVID-19 seems to have created what I like to call a "culture of care" where we are experiencing a new level of empathy. I have seen it in my research work, in B2B customer engagements and with internal conversations with colleagues. Much of the pretense of suits and ties, perfect makeup and every hair in place has been stripped away to uncover a new level of transparency and humanness that includes crying children, barking (and snoring!) dogs and hoodies.

Bringing the sense that we are more than our titles or our roles to our work as researchers is key to moving beyond the mere gathering of data. That is when we build rapport, create connections and fully see, appreciate and HEAR one another.

A presenter looks outward from the stage for engagement, acknowledgement from the audience and feeds off that energy. Imagine presenting to an empty auditorium. Even the most confident and passionate speaker would quickly feel deflated.

As a parent, it is important to let our children know we hear them. It is through that validation that they build self-esteem. They learn that they matter. The child in the classroom who raises his hand over and over to answer the teacher's questions – neglect to call on him too many times and he will stop trying, feeling overlooked and unimportant.

Whether it is in personal relationships, business communication or this world of research, let's all try to remember that while there is value in the gathering and sharing of information, there is greater, lasting value intrinsically in being heard. Give that honor, the honor of being heard, to someone today.

Kaylor Hildenbrand is senior manager, innovation insights at Georgia-Pacific LLC.


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••• the business of research

Healthy strides

How Microsoft researchers are putting DEI priorities into motion

| By Shelley Krasnick and Josh Billig

snapshot

From going mobile-first to increasing accessibility, the authors outline Microsoft's research inclusivity efforts.

In some ways, inclusion – from a statistical vantage point – has been on the minds of insights professionals for decades. Representation has been a mark of quality in research of all kinds, assuring that all voices are counted in proportion.

But inclusion has now evolved into a much broader concern, one that has grown well beyond sample sizes and population counts. Brands need to recognize and meet the needs of all types of consumers – ethnically diverse, differently abled and with a strong preference for certain modes and devices for communicating. Researchers need to take on this newly expansive definition as both a mission and a mandate; if getting representation right was complex before, it has grown even more challenging – and more important.

A journey, not a destination

First and foremost, we would not claim that we have solved, once and for all, any of the myriad challenges around inclusivity in research. This is a journey, not a single destination, and we share our experience to date in that spirit. Everyone has something to contribute and companies throughout the insights industry will continue to learn from and improve on each other's work. Inclusivity is not something any one company – or even pair of companies – can conquer alone but we are making strides.

Three of the areas where Microsoft and GfK have collaborated over the last several years are all top-of-mind for insights professionals today:

- making research truly mobile-first – prioritizing the devices that most people use to complete surveys these days, thereby representing the online population;
- assuring that Hispanic populations are represented proportionally in surveys; and

• making research participation accessible to everyone regardless of ability.

Important place to begin

Our journey to mobile-first actually started back in 2018. It doesn't fit into the traditional definition of diversity, equity and inclusion (DEI) but when we were putting this story together, we recognized that device usage is an important place to begin talking about inclusivity. GfK Consumer Life data shows that 75% of Americans age 15+ used a smartphone in the past 30 days. Moreover, if they had to give up all but one of their possessions, most people in the U.S. would choose to hang onto their phones. This incredible symbiosis and dependence, developed over just the past 20 years or so, has had a profound impact on research participation – but not always on study and survey design.

When we began this process, like many others in the industry, we were still overly oriented to PC-based survey-taking. As we looked deeper into the experience, we could see clear evidence that our survey experience served in this manner was not optimal for those on a mobile device. In fact, while smartphones accounted for 30% of survey starts, they only accounted for 5% of our survey completes. And survey satisfaction metrics were markedly lower among those taking a survey on a smartphone. Seven in 10 PC respondents felt they fully understood the survey's questions, compared to just half for smartphones (Figure 1). And we saw similar differences when it came to user-friendliness and survey length.

So what does this mean and why does it belong in a conversation about inclusivity? When we started to look at the audiences who were taking our surveys on a smartphone, we quickly realized that our current experience, which was leading to so many dropouts, was also excluding key audiences. For example:

- 18-to-24-year-olds are three times more likely than the total population to use a smartphone for surveys;
- Spanish/Hispanic and African American respondents are much more likely to appear in smartphone samples; and
- smartphone respondents are more likely to earn less than $50,000 annually and less likely to have a four-year college degree.

By not providing an environment where respondents are able to take the survey in their way, we were clearly missing out on some key points of view. As a result, we committed to taking a mobile-first approach for all surveys, to make sure we were capturing all potential voices.

It is worth pausing here to note that when we say mobile-first we are making an impor-

Figure 1

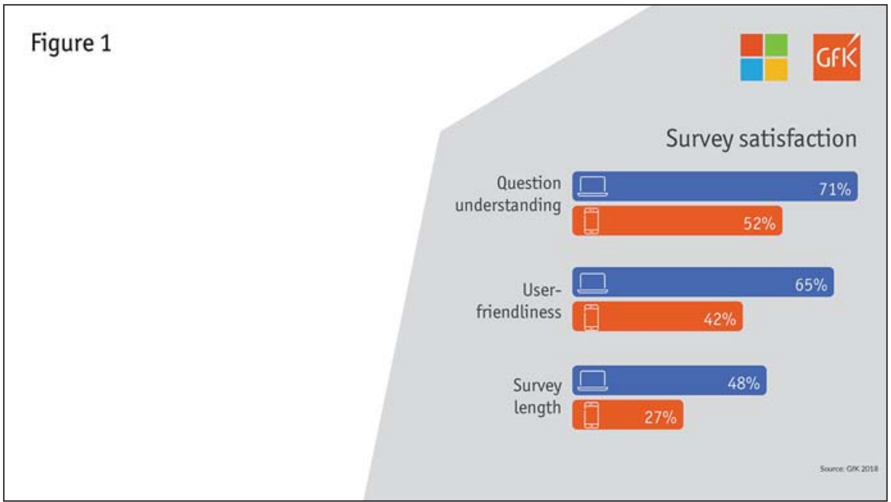


Figure 2

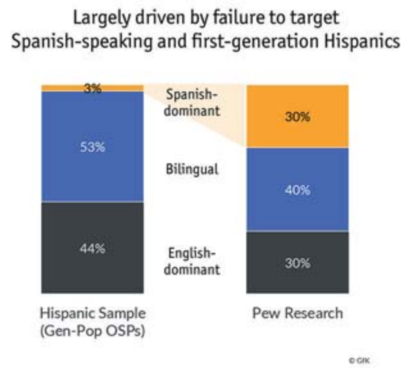
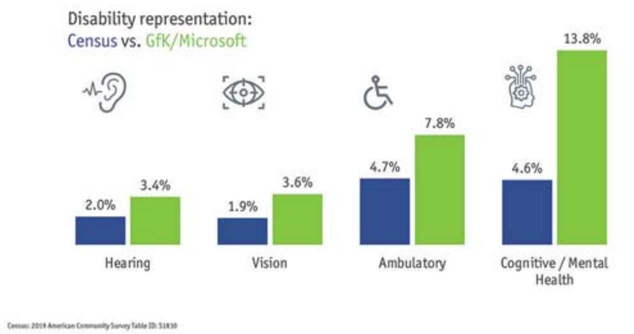


Figure 3



tant distinction versus simply mobile-friendly. The changes we made to be mobile-first were across all devices – so the experience is intended to impact the experience for all respondents on any device.

What actions did we take to be mobile-first? One big step was keeping ourselves honest on survey length. To serve a mobile audience, we needed to make 15 minutes our maximum survey time – which meant making some tough decisions about the information we really needed to drive key business decisions. We took a hard look at question and statement length, as well as a variety of other factors.

We also explored a number of design changes intended to smooth the mobile experience. We moved to a banked design, for example, which allowed us to get the same functionality we were getting from grids, but with better usability. The buttons are also bigger and easier to select, making smartphone responses a breeze. In another scenario we utilized accordions instead of grids.

As a result of all these changes, we saw a 24% decrease in dropouts across all devices, not just mobile. So inherently the experience improved for all users. Going mobile-first also improved our representation from a number of perspectives – certainly across device type but also across ethnicity, education and household income.

Further to go

It may seem like the industry has been talking about representing Hispanic consumers for years – and some progress certainly has been made. About a year ago, however, Microsoft developed a cross-disciplinary Team of Teams to audit diversity and inclusion in research. One consistent issue we found was underrepresentation of Hispanic consumers. This just revealed how much further we still need to go.

As we dove into solutions, we identified some key issues right at the start. Specifically, we discovered that the incidence of self-identified Hispanics was much lower in our research than census data indicates. Further investigation discovered that the Hispanic population included in our sample tended to be older, more educated and have higher incomes. We chose to leverage Pew's National Survey of Latinos[1] to understand how to accurately represent the U.S. Hispanic population.

While a representative population is split 30/40/30 according to language dominance, our sample was dramatically skewed to bilinguals and included almost no Spanish-dominant respondents (Figure 2). This was largely driven by a lack of Spanish-speaking and first-generation Hispanics.

One proposed solution was to give all respondents the option to complete the survey in Spanish or English. However, conversations with our mainstream online sample providers drove us to the realization that this would not resolve our underrepresentation issue – U.S. gen-pop panels do not adequately represent Hispanic consumers. In fact, we found a disproportionately low incidence of Spanish speakers.

Our solution: GfK and Microsoft devised a method which involved:

- including Hispanic panels to broaden our sample;
- asking acculturation questions to ensure a representative sample of self-identified Hispanics; and
- weighting this augmented sample back into our gen-pop sample.

In the end, we found that adjusting our representative population of Hispanics did not move our total numbers significantly; scores on key metrics – such as ease of use, innovation, love, relevance and quality – only jumped by one point each when we included the Hispanic augment. But, diving deeper, we found that we have succeeded in incorporating a crucial point of view in our studies, with differences between Hispanic and non-Hispanic sample rising four to nine points on these same metrics.

Our solution worked but it is

expensive and laborious in a large, multifaceted brand-tracking study. Ultimately, this is a problem that needs to be addressed at an industry level, so that a representative sample will be considered the norm.

Accessible to all

The third component we took on is accessibility – namely, making our research accessible to all respondents.

First let's talk about the definition of a disability. Research accessibility is a huge and important challenge – possibly the hardest topic of the three covered here to get your hands and head around. A wide variety of populations can have difficulties getting to or taking conventional surveys. For the purposes of this work, we opted to focus on four disabilities that we could identify through census data for benchmarks: visual, auditory, cognitive and mobility.

Furthermore, we opted to think about disabilities as situational, temporary or permanent – with the belief that if we solve for someone with a permanent disability, we also solve for those who are in temporary or situational scenarios (so if we solve for one, we solve for many). For instance, someone could be experiencing a visual difficulty in a few ways. If they have a permanent disability, they could be blind. Someone could alternatively be experiencing cataracts or be blinded by the sun in their eyes – situational or temporary scenarios causing visual difficulties. If we create a solution for someone who is blind, that can similarly relieve an issue for others in these alternative scenarios.

To take on accessibility in our research, we came at the problem from two angles:

- Are people with disabilities represented in our survey population?
- Are we creating an environment that enables people with disabilities to take our surveys?

In response to the first question, we had hypothesized that our representation would be low since we know our survey environment has not been fully optimized. So we were surprised to learn that, in fact, we overindexed versus the census in terms of representing people with disabilities (Figure 3). One of our main hypotheses for this difference is that some respondents may be more comfortable classifying themselves in a survey environment as compared to the census.

This does not mean that we are getting a representative response from all our survey takers, however. In fact, we are sure we are still letting some of our respondents down and making their survey experience too difficult.

So how are we making our surveys more accessible to all? Here are a few examples of what we are doing to ensure we get it right. Some are harder than others!

- High-contrast screens – allowing those with vision challenges to see our content clearly.
- Correctable answers – respondents should be able to correct, change or edit answers after their initial selection of a response.
- Keyboard navigation – all functionality of the content is operable through a keyboard interface without requiring timing for individual keystrokes. Keyboard navigability is necessary to operate assistive technology (for example, screen readers).

This is only a small selection of the steps we are taking to be fully accessible. As we work through this part of the journey, there are two important things we have noted. First, there is a natural push between mobile-first and accessibility in terms of functionality. For instance, when moving our surveys to mobile-first, we set up some questions to auto-advance, so respondents had fewer clicks. We needed to think about that here, as respondents with cognitive issues may need more time to consider a response. And respondents with mobility/dexterity issues may mistakenly hit a wrong answer. We need to be willing to have these hard discussions as we optimize the overall experience. Second, we need to partner with people who are experiencing these disabilities to help us better understand the problem and the solution.

Take together

As we said earlier, this is a journey we need to take together as an industry. What we have learned, more than anything, is that we have to slow down and ask questions. There is no DEI checklist to be followed. Researchers need to think about diversity and inclusion in all of their research; unless you are being intentionally inclusive, you are likely being unintentionally exclusive.

We need to be willing to collaborate and experiment to drive toward better solutions. Some things we can solve as individual researchers but others involve us coming together as an industry to find a fix. While we have shown some tangible steps here, we look forward to hearing about the steps you all are taking as we try to move the industry in this direction.

Shelley Krasnick is vice president, marketing effectiveness at GfK. Josh Billig is market research manager at Microsoft.

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••• health care research

A map on the road to recovery

How can digital health technology improve the patient journey?

| By Tom Donnelly, Mary Putman, Sam DePasque Swanson and Pam Rubio-Soletto

snapshot

Input from health-focused respondents gives guidance for makers of digital health tools.

The acceleration of digital health tool (DHT) use, along with patients' increased willingness to provide nontraditional data, has provided the health care community the opportunity to improve health care outcomes for patients and health care practitioners. In this article, we will discuss key points in patients' journeys where health tools can be most impactful, as well as the types of data that can be leveraged to improve patients' journeys across acute, chronic and wellness paths.

DHTs encompass a variety of options and have scattered use depending on the specific tool, type of journey and stakeholder using it. Some DHTs are useful for patients (e.g., health trackers), some provide critical information for health care practitioners (e.g., home monitoring) and some are provided by payers (e.g., telehealth, apps for chronic health issues). Companies that manufacture DHTs have diverse goals in the development of their offerings, ranging from disease prediction, health monitoring and adherence motivation.

When considering how DHTs can be leveraged to improve patients' journeys, it is useful to examine the framework of standard patient journeys. Often, a patient journey is developed by a company to better understand patients' needs and where intervention may be useful. Thus, many journey maps are disease-specific and most do not include digital experiences, tools or support. They are often missing potentially useful elements such as emotional data, data sharing, input from a health advocate or family member and the individual's own goals and motivations.

Methodology

This research was conducted by the Digital Healthcare Collaborative (DHC), a collection of thought leaders from pharmaceutical manufacturers, solutions providers, medical systems and health insurance companies. Each year, the DHC conducts several rounds of research as part of an innovation process to leverage digital tools to improve patient outcomes. We focus on the future of patient/population experiences and engagement solving for the next two-to-five years. The real strength of the group is that we are solving common problems and are not limited to the lens of one company.

The research described includes qualitative research (described below), followed by two online surveys: a 20-minute survey with 1,064 patients conducted March-April 2020; a 20-minute survey with 1,443 patients conducted March-April 2021. Both were demographically representative samples of the U.S. using Dynata's panel.

The preceding qualitative research included homework exercises, one-on-one discussions, focus groups and web-enhanced tele-depth interviews to understand patient journeys and the need for digital solutions. The sample included 25 patients in the summer of 2019 and 30 additional patients that fall. All respondents were adult smartphone users and had to fit one of the following criteria: had an acute medical event in the past year (involving surgery/hospital stay or an urgent, emergency medical event); diagnosed with a chronic condition; currently focused on/interested in improving their health and wellness.

Smart/genius framework

To help respondents describe their unmet needs in a way that would help manufacturers conceptualize future tools, we developed a framework to discuss the use of DHTs. For a detailed description, please see our article in the November/December 2020 issue of Quirk's ("Empowering or powerless?" https://bit.ly/35DVumG) Since that time, we have changed "stupid" to "frustrating" and "dumb" to "not smart."

Frustrating: Collects some data but uses it wrong or should be using data and it's not, making the experience the worse than it used to be. Feels frustrating.

Not smart: Doesn't use data but gets the job done. Could be improved by using data or if it was digitized. Feels unintelligent.

Smart: Uses data to make the experience easier/better than it used to be. Feels smart.

Genius: Uses data to make the experience truly helpful, create better health outcomes and/or predict things for you. Feels genius.

Results

Overall, most respondents feel a digital tool could help them manage their health and well-being. Diet, exercise and taking medication are the most important aspects that a digital product can help (Figure 1). Digital health tool usage increased from 66% in 2020 to 81% in 2021, playing a significant role in most people's lives. Devices are commonly used to research conditions and schedule appointments (Figure 2). There is an increasing level of desire for the use of digital health tools and an increasing use of digital devices to improve health.

The research examined three different health journey archetypes to better contextualize data usage. We created detailed journey maps that included self-care, health care team and health care industry components for jobs to be done, health advocates, smart digital support, prediction virtual support, managing emotions, digital tools, data, resources and individualization. Figure 3 shows an

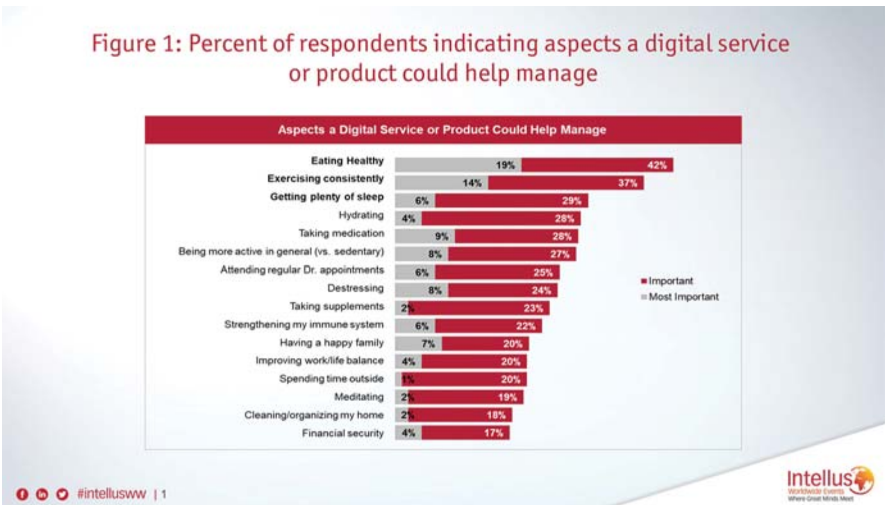


Figure 1: Percent of respondents indicating aspects a digital service or product could help manage

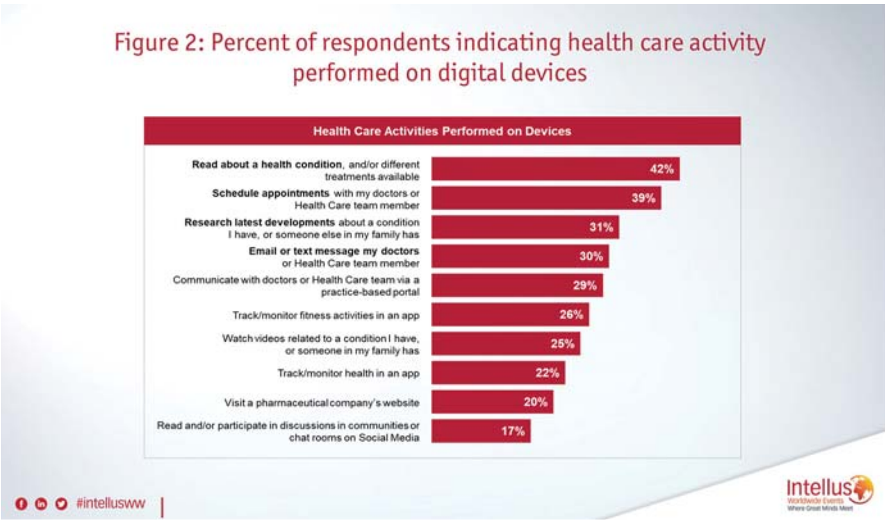


Figure 2: Percent of respondents indicating health care activity performed on digital devices

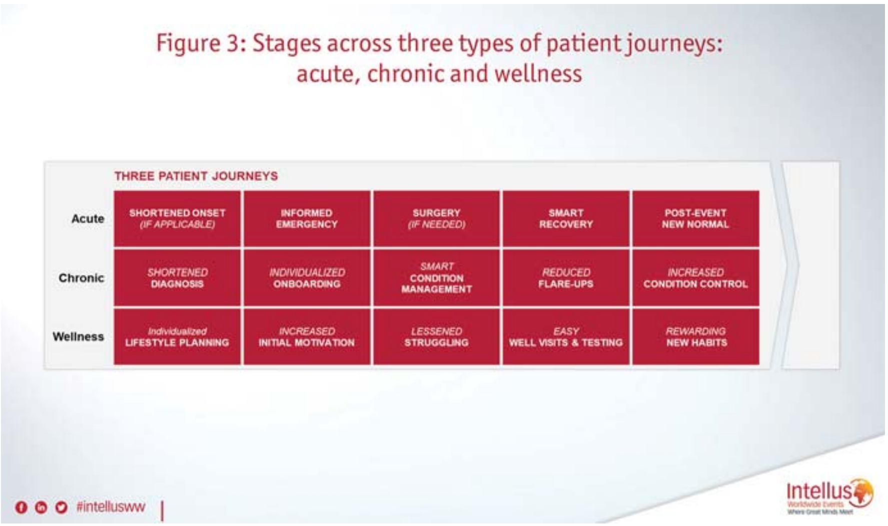


Figure 3: Stages across three types of patient journeys: acute, chronic and wellness

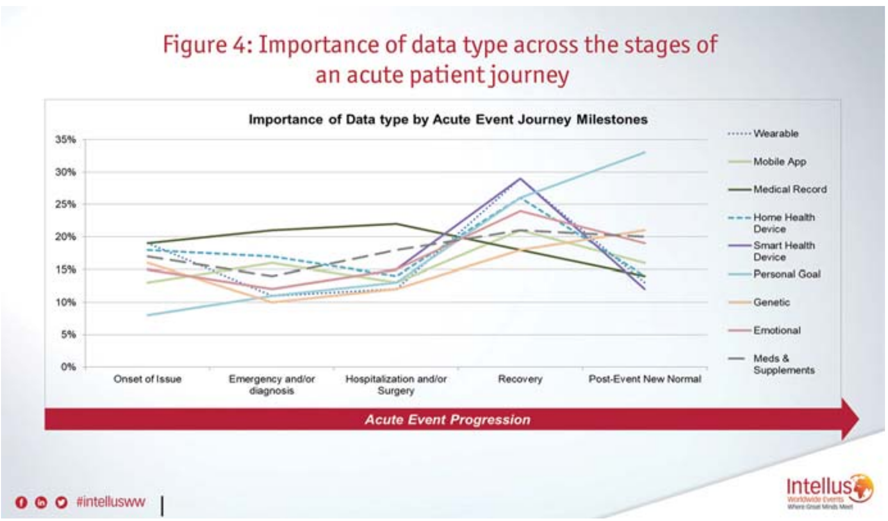


Figure 4: Importance of data type across the stages of an acute patient journey

overview of the stages of the three types of journeys: acute, chronic and wellness.

Patients on an acute journey were asked about where they felt a digital health tool would be most effective. Improving or making the onset of an acute event easier to go through is the biggest need for patients who've suffered a recent health emergency or serious medical event. Different types of data are important at different stages of the journey, with a data importance spike during recovery (Figure 4).

Chronic patients feel that the most important types of data for improving a majority of milestones is directly tied to their personal goals and emotional well-being versus data measuring their physical health. The relative importance of data shifts more drastically among those with a chronic illness; patients believe data is most important in relation to learning to manage or control their condition (Figure 5).

Of the three journey types, wellness had the most variance of data importance across milestones, with consumers feeling data is most important during health and wellness visits (Figure 6). Similar to the chronic and acute patients, wellness consumers feel a truly helpful health tool is most important during the initial milestone of their journey as they figure out to fit health into their life.

Respondents were asked about the types of data they felt comfortable sharing and with whom. Patients are comfortable sharing more traditional types of health data if it means receiving truly beneficial tools; however, emotional, genetic and mobile app data are less likely to be shared – especially with an insurance company compared to an HCP. Types of data patients feel more guarded about holds true across health and wellness journey types, though those who have experienced an acute event are more willing to share their data (Figure 7).

The qualitative research indicated that using emotional data to support well-being will become more accepted over time. Patients are receptive to emotional data being used to help moderate the emotional roller coaster they feel every day. They recognize that stress and negative emotions have a major impact on their health and well-being and therefore most welcome their emotional data being used support them through digital and human interactions (and experiences that are a mix of both). For the wellness journey, they want emotional data used when they are struggling and during physician visits. For the acute journey, emotional data is most important to support recovery. For the chronic journey, patients want help during condition flare-ups.

Different milestones

How can we use technology to improve the patient journey experience? People feel that data can be used to improve different milestones within different journeys. The common thread among all types of journeys is the need for a truly helpful health tool during the initial milestone of their journey. A key watch-out for all the tools is that the user needs to know how data is being used to help them at point-of-use. Show them how the data is being used and

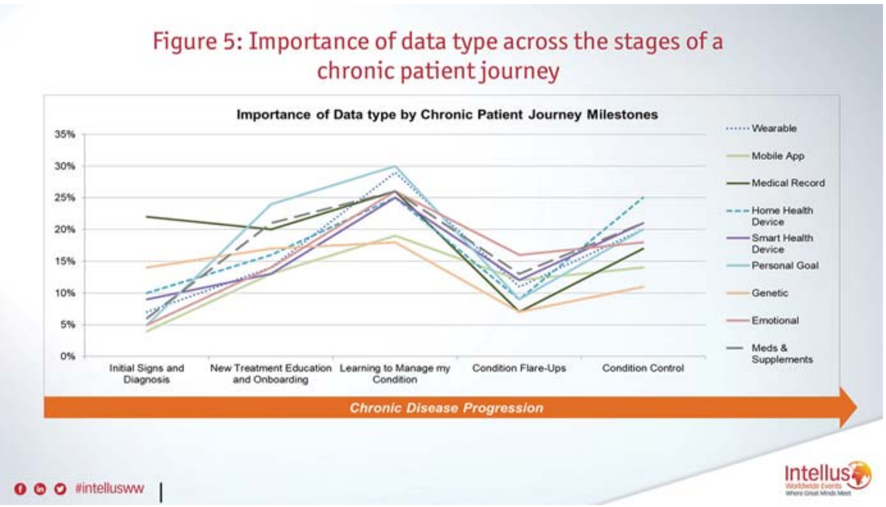


Figure 5: Importance of data type across the stages of a chronic patient journey

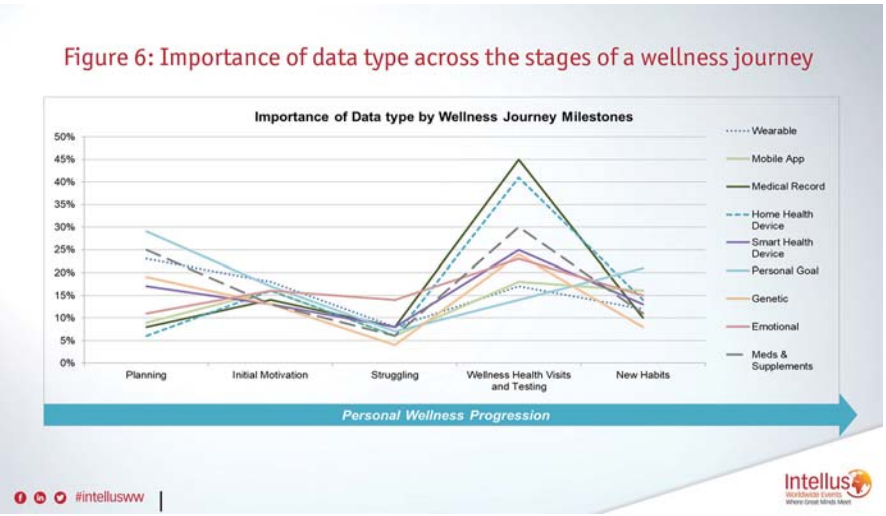
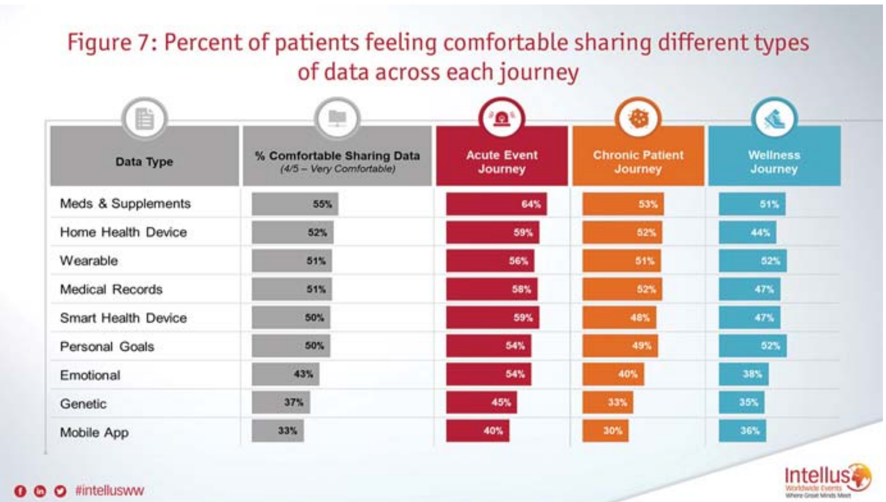


Figure 6: Importance of data type across the stages of a wellness journey



Data Type	% Comfortable Sharing Data (4/5 – Very Comfortable)	Acute Event Journey	Chronic Patient Journey	Wellness Journey
Meds & Supplements	55%	64%	53%	51%
Home Health Device	52%	59%	52%	44%
Wearable	51%	56%	51%	52%
Medical Records	51%	58%	52%	47%
Smart Health Device	50%	59%	48%	47%
Personal Goals	50%	54%	49%	52%
Emotional	43%	54%	40%	38%
Genetic	37%	45%	33%	35%
Mobile App	33%	40%	30%	36%

Figure 7: Percent of patients feeling comfortable sharing different types of data across each journey

assure them their data is safe and will not be used against them.

For the acute journey, the tool people are most interested in is one that helps during the onset of the issue using their medical record and wearable data to help with diagnosis. For a simple diagnosis, this is a tool for their doctor but for a complex diagnosis, the patient and doctor need to use the tool together.

The next-best patient tool is one that helps with recovery and the post-event new normal. Depending on the acute event, that tool could look a lot like the tool for managing a chronic condition or a tool for improving overall post-event wellness.

For the chronic journey, the tool people are most interested in is one that uses their medical record and genetic data to improve initial diagnosis. For simple diagnosis, this is more likely a tool for their doctor(s) but for more complex diagnosis this tool is critical for both patients and doctors. For patients, the next-most impactful tool is one that helps them with controlling their condition using biometric data from a home health device or their smartphone to track their symptoms, medications and supplements and progress towards their personal goals for their condition. A smart tool ensures they have the right medication, maps out their preventative recommendations, helps them set the right health goals and make in-the-moment decisions. A genius tool would predict and help them mitigate flare-ups and comorbidity.

For the wellness journey, the tool people are most interested in is one that helps with setting personal goals that fit into their lifestyle and provides additional support for their initial motivation and when they are struggling. It would use wearable and emotional/motivation/mind-set data to know when they are struggling and provide support. An impactful wellness tool will also improve the discussion they have with their doctor during their wellness visit.

Set the stage

In designing digital tools to help patients, manufacturers should think holistically about patient journeys and look for places to include smart or genius digital tools. Keep in mind that standard journey work misses key points, especially where a digital health tool can be used and the type of data that should be collected. Currently, personal goals and emotional health data are underutilized in helping manage health and well-being. The increased use and expectations for digital health tools, combined with patients' increased willingness to provide nontraditional data across their health journey, has set the stage for companies to design smart – and even genius – digital health tools to help patients and their health care practitioners improve health outcomes.

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••• health care research

Taking stock

Researchers assess the current health care landscape

| By Abbey Ahearn, Jarod Ricci and Steve Yonish

snapshot

A look at key themes around patients, clinical trials and technology from the Intellus Trends and Futures Survey.

Intellus Worldwide, an organization for health care insights professionals, has partnered with Trinity Life Sciences to track the ever-changing pharmaceutical marketplace and the impact those changes may have for the market research professional through the annual Trends and Futures survey. The Trends and Future survey has been developed by Intellus membership to gain a deeper insight across several categories of exploration from the perspective of manufacturers and agency suppliers. The Wave 1 (Q1 2020) survey focused on identifying broader trends influencing health care researchers, while the most recent Wave 2 (Q1 2021 survey[1]) signaled broader insights across the key thematic areas of consumers, clinical trials and technology. Each wave of the survey includes a sample of health care market researchers at biopharmaceutical and health care companies as well as professionals across market research, data, technology and sample providers.

Consumers

Today, U.S. consumers make the decision of where they receive care more than ever. As in all aspects of life, we want to receive goods and services quicker, better and cheaper, so why should health care be different? Over the years, consumers often were directed to where they received care as their insurance plans did the bulk of the paying. However, with people seeing premiums and out-of-pocket (OOP) costs increase year after year, it becomes inevitable that insurers shift more away from strictly controlling site of care as consumers assume more of the cost burden. In fact, the insurer's network of coverage is expanding to where consumers have much more choice compared to a time when your primary care physician's (PCP) office might not have had an option for labs covered by one's insurance. Why might this aspect of health care delivery be shifting?

The Intellus Trends and Futures Survey (Wave 2)[1] found that:

- 42% agree patients will increasingly shop around to better manage their

out-of-pocket costs for medications and services (-7% vs Wave 1).
- 31% agree consumers' out-of-pocket expenses for medications will increase significantly (-11% vs Wave 1).
- 24% agree (64% neutral) consumers will seek alternatives to integrated delivery networks that can provide more individualized care (n/a Wave 1).

The survey data would suggest that the current level of OOP costs is perhaps flattening to where the consumer, for example, is agnostic between the assumed lower copay cost to see a network PCP versus the convenience of an assumed higher copay for an out-of-network urgent care. With 64% of survey respondents having a neutral view on consumers looking for more individualized care, there are hypotheses we can monitor in trends moving forward. The most individualized care would have patients longitudinally seeing a single trusted health care provider (HCP) who would have all the information about them to be able to offer the optimal treatment. The observation of consumers shifting away from a single HCP point of care for all symptom origination could indicate a few things. First, consumers have either high trust across HCPs for their care or perhaps don't discern a lack of care by seeing HCPs with whom they may not have a direct relationship. Second, by nature, consumers want to garner "more" and make decision trade-offs that they believe improve the health care they receive. The question then is, what are the criteria included in these consumer trade-off decisions?

Today, a consumer might have an acute injury, go to urgent care and be treated by an HCP whom they have never met before. A week later they may have a telemedicine visit offered by their employer benefit where they receive an Rx from a different HCP they have never met before, then sometime later see their local pharmacy for an adult vaccination and, finally, visit their PCP for a chronic condition checkup. The site of care and insurer benefit evolution has naturally led to consumers optimizing where and how they manage their health.

Wave 2[1] found that:

- 51% agree CVS, Walgreens and Walmart minute-clinics will compete to be the first point of primary care (+7% vs Wave 1)
- 43% agree urgent care offices will compete to be the first point of primary care (+3% vs Wave 1)
- 37% agree retail pharmacies will compete to be the first point of primary care (+11% vs Wave 1)

As respondent agreement is trending towards non-traditional sites of care becoming more prominent providers of primary care, what does this consumer convenience mean for us in the pharmaceutical industry and as insights professionals? In more recent years we have seen the big data explosion and now the seemingly shiny AI/machine learning emergence for a way to solve the answers believed to be housed within big data. However, as we become more data-rich, are we not also losing visibility into consumers along the journey? Let us think about how typically claims data is utilized to see the path of patients longitudinally. Within a closed claims system, data sets that most manufacturers or vendors procure provide a good lens of the consumer journey for a given diagnosis, as long as it is included within the claims network. As consumers go to new sites of care for differing types of care, this longitudinal visibility begins to diminish as the claims may or may not be completely represented. As patient sites of care change, there is potential for HCP prescription-writing to shift by some degree that would in turn, perhaps change how and where field representatives or medical representatives should focus their attention. Or perhaps, the pattern becomes a minor shift and because of the fragmentation of the data across so many sites of patient care, we miss an important gap in the patient journey.

Clinical trials

The global COVID-19 pandemic led to unprecedented changes in our lives. It has also showcased resilience that many did not think possible. One of the positive achievements during the pandemic has been the speed of therapeutic development due to the partnership between government and private companies. When resources can be focused accordingly, the speed that a therapy can reach the market compared to what typically had been multi-year endeavors is dramatic. The question now might be, could that speed of therapy development be expected to hold for future pipeline products?

Wave 2[1] found that:

- 24% agree the fast-track review process for COVID-19 vaccines is a regulatory pathway that will be more broadly applied for pipeline assets (n/a Wave 1).
- 18% agree that public trust in the regulatory review process for new products is waning (n/a Wave 1).

The quarter of respondents who see broad applicability for the COVID-19 regulatory pathway reflects ample skepticism among the majority that this model will become a regulatory standard. Part of this skepticism is likely rooted in the high investment level required to support asset development and the constraints on a firm in moving multiple assets forward at the same rate. As a result, industry hopes for COVID-19-like speed and responsiveness in the regulatory pathway is not likely in the near-term to de-risk portfolio management of assets in development.

Despite skepticism associated with the COVID-19 regulatory pathway, respondents were not in agreement that public trust in the development process would be diminished. It's important to point out that the survey preceded the recent controversy associated with the FDA approval of Aduhelm. Moreover, the FDA's handling of guidelines associated with the COVID-19 booster shot has further contributed to controversy hanging over the "gold standard" institution of regulatory approval. The optics of these recent developments, coupled with public sentiment among those who distrust the speed with which the vaccine was approved, are likely to be additional factors manufacturers must contend with as the efforts to move therapies from development to market continue to accelerate.

Even before COVID-19, manufacturers were in an increasingly challenging position to seek innovation that will drive down clinical development cost and timelines. As manufacturer portfolios include a heavier weight of rare or less-prevalent disease, the investment in trials will not produce the same market return on investment as the days of Lipitor/Crestor/Zocor. To continue long-term viability, the pharmaceutical industry must evolve how new drugs are brought to market.

Wave 2[1] found that:

- 45% agree that R&D productivity will improve the pace of new therapies brought to market (22% Wave 1).
- 53% agree that predictive analytics will increase drug development efficiency (45% Wave 1).
- 11% agree that drug approvals will be granted where predictive analytics output will be an acceptable means to forego large-scale clinical trials (7% Wave 1).

There is clear respondent agreement that R&D productivity will increase, with one of the key aspects being through the use of predictive analytics to drive the clinical outputs. It is an interesting time where technology advancement is being integrated into the drug development process. As technology is integrated, respondents have lower agreement that it will be used to forego any large-scale trials. This makes sense as the elements that technology is addressing augment existing processes, thereby permitting the efficiency, quality or additional data (e.g., patient-reported outcomes) that might be used in analyzing the study information. How do changes in trials affect the market researcher? One could argue that primary market research should be done earlier in the clinical phases of development and have more significant budget. For example, patient journey work done in Phase I/II rather than when companies typically begin ramping up commercial planning at or near Phase III

Technology

Where patients are treated, who treats them and how treatments make it to market are ever-changing. Behind the scenes, technology (and the data it leverages) plays an essential role by: enabling a shift in salesforce activity to include more virtual visits and non-personal promotion; delivering new channels for reaching consumers; and driving improvements in diagnosis and treatment decisions. Though technology trends in the Intellus Trends and Futures Survey (Wave 2) outputs were somewhat overshadowed by COVID-19-associated repercussions, technology continues to evolve exponentially and is a focus area of survey response agreement.

Survey[1] respondents agree that technology will have an impact for patients as follows:

- 57% agree that technology/analytic algorithms will become more prominent in generating treatment recommendations in clinical practice (-9% Vs. Wave 1).
- 48% agree that technology/analytics will become more prominent in diagnosing patients in the office practice (-19% Vs. Wave 1).

Agreement wave over wave is relatively high, likely driven by the promise of predictive analytics that always seems to be just around the corner. While agreement declined from Wave 1, perceptions of a decline could in part be related to the pandemic. Some recent reports suggest that technology's potential contribution to the diagnosis and treatment of diseases is growing rather than declining – like CVS' Transform Diabetes Care, which uses predictive analytics to identify patients at greater risk for diabetes and helps those with diabetes better manage their care. Similarly, Mass General Brigham has partnered with Nuance Technologies to develop AI tools in an effort to transform radiology.

As AI and predictive analytics are applied on a more widespread basis at the practice level, how will the insights professional's role change? In helping educate clinicians on treatments, how can we better understand the influence of digital diagnostic and treatment tools on attitudes and behaviors? In our efforts to understand HCP decision-making, are we doing enough to understand how those decisions are now impacted by technology in addition to other longstanding factors like access?

Per Intellus' members responding to the survey[1]:

- 54% agree that pharmaceutical

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LEARN FROM THE BEST IN THE BUSINESS

Data and creatives: Immovable object vs. unstoppable force?

Presenting important data and research can be difficult, at times, with any audience, but when you add in creative professionals, you can quickly lose your audience. Hear from someone who has spent 20+ years across National Geographic, Fox, Disney and the WWE about how to keep creatives entertained and focused on what they need to hear.

Both sides now

Woodside Homes

Woodside Homes Director of Consumer Insights Jason Jacobson discusses seeing insights and research from both the consulting and insights perspectives and how to bridge the gap between the two sides.

5 steps to internal insight democratization

Vimeo

In this session we will explore five steps for democratizing insights within your organization and delve into five principles for successful insight democratization.

Implementing a CX program: The good, the bad and the ugly

Woodside Homes

On the surface, implementing a CX program should be easy, right? Just figure out your touchpoints, survey questions, secure a vendor – and boom, there you go! However, there are a lot of challenges and pitfalls that should be revealed and out in the open. Here is our experience.

Uncorking a Story: Qualitative lessons learned by interviewing A-list authors

Uncorking a Stroy

At its core, marketing is a field that is built on creativity. What do consumers need? How can we make that? How can we best tell them about it? How do we get it to them? Creativity is fueled by stories. Stories capture our attention and move us to think, feel, and ultimately do. Authors dream up stories for a living and I've been uncorking their stories for the past nine years in qualitative interviews through a podcast. This presentation will illuminate the lessons I've learned from authors and link how they apply to marketing and qualitative market research.

Design for actionability

J.P. Morgan

This session will focus on how to design research from the very beginning, with action and impact in mind to expand the value of the corporate researcher's role and make a greater difference in the business.

Insights roadshow: Take your stakeholders on an immersive trends journey

Identifying and prioritizing consumer trends is crucial to ensure innovation and business decisions are relevant and successful in a consumer-centric marketplace. But statistics and competitive case studies often cause trend presentations to fall flat. We'll discuss how to make sure your business partners are fully engaged and understand the world in which they are doing business.

Mind the gap: Elevating in-house research

Heidi Carrion of the J.M. Smucker Company shares techniques to obtain credibility and better communicate insights, therefore elevating the value of in-house research.

Quantifying qualitative data: Using technology to find the signal in the noise

RealityCheck Consulting

Qualitative research's "soft science" interpretative nature has long put it at a disadvantage to quant's "hard science" reputation. Qual is still seen as "directional" and "preliminary" compared to quant's confirmatory nature.

But these days, asynchronous online platforms, AI text analytics and coding software in the hands of a skilled qualitative researcher can change all that.

In this relevant presentation, Jim White, founder and president of RealityCheck Consulting, shares how technology combined with a human touch can make qualitative analysis deeper, richer and more robust. asynchronous online platforms

Obstacles to home buying by race/ethnicity in a post-COVID market

National Association of REALTORS

The current real estate market is unlike any in American history and prospective home buyers are finding it more and more difficult to become home owners or to move into new homes. A lack of affordable housing nationwide was exacerbated by a rush for new and different homes during the COVID-19 pandemic. Meanwhile, homeownership rates among African American and Hispanic/Latino Americans remain well behind that of other racial and ethnic groups. The National Association of REALTORS® (NAR) conducted a study to help find out why.

How opinion shapes the future and foresight

Ipsos

Foresight, a growing discipline in market research, is about imagining potential futures. But those futures will be impacted by the opinions we hold in the present. In this session, we will consider the critical role that market research plays in how researchers should think about the future and how those scenarios can guide the questions we ask today.

The five people you meet in the room where it happens

Vanguard

Who's in the room when you are reading out findings to your client? I bet you see the same personas over and over. We'll take a quick, lighthearted look at five of the most frustrating people you meet in the room where it happens – and how to keep them from de-railing your project.

The agile research toolkit

Lincoln Financial Group

This presentation highlights Lincoln Financial's journey to adopting and adapting a research toolkit to make research and insights relevant again. Most researchers have heard the stakeholder complaint that research takes too long, costs too much and doesn't have the desired impact on decision-making. How can market research functions leverage new technologies, evolve to keep pace with decision-making and earn its seat at the table as insights partners?

New tech approaches for supercharging quant-qual hybrid studies

Aha! Insights Technology

In this informative how-to session Ray Fischer, CEO of Aha! Insights Technology, will share several pragmatic approaches to deliver the compelling human story behind the numbers delivered by large quant studies. These C-level accepted approaches are rapidly gaining adoption by major brands as a de facto approach to segmentation and new product development. They will also save time and money in the research cycle by combining methods without compromising insights. In fact, these combo methods will enhance your learnings and takeaways to deliver more tangible results than executing quant and qual in silos.

Maximize conversion in e-commerce with AI image recognition

eFluence by Behaviorally

When brands optimize content on the digital shelf, they can increase conversion rates by over 50%. In this presentation, Behaviorally's new technology division, eFluence, will provide you the guiding principles to succeed in e-commerce including how to keep it simple, use brand assets wisely, be clever with color and contrast, learn the category rules and more as the e-commerce landscape is ever-changing.which helps brand marketing teams by instantly auditing thousands of e-commerce images to identify the top performers and the deficient images to guide your optimization strategies to increase conversion rates by over 50%."

We will also present the latest case studies and an in-depth demo of our AI-powered platform that was co-developed with some of the world's leading brands: Flash.PDP

From NHL to INC: Tools for corporate mental health literacy from Chicago Blackhawks' director of performance psychology

Apen Finn Strategy + Insight, Chicago Blackhawks

Join Dr. A.J. Sturges, director of performance psychology for the Chicago Blackhawks, and Julia Eisenberg, EVP at Aspen Finn Strategy + Insight, for a candid discussion on the importance of mental health literacy in corporate team settings. This discussion will focus on holistic management approaches to driving performance and retaining talent, as well as mindful ways to address the culture of stigma tied to mental health needs and support.

Build it close to the ground and knock it down – Reframing your data listening lenses

FaderFocus

Wide open listening and observing is one of a qualitative researcher's super powers and these skills can help reframe how companies think about, gather and interpret data.

This presentation will share listening and reframing tools that will help businesses bring their data lenses more into focus."

Research Really Works

Mutual of America

Financial institutions are encouraging as many customers as possible to forego paper statements. Cost control, customer experience, the environment and data privacy are all at stake but how can a campaign come out of the gate with the best chance of success when your organization has no data records and no insights culture? Asking the right questions, executing fast, simple research and monitoring results can drive short term results and longer term culture change.

How to outperform as a corporate research professional in 2022 and beyond

The demands on corporate researchers have never been greater. But what defines and differentiates truly successful corporate research professionals?

If nothing else, 2020 and 2021 have highlighted the need for corporate researchers to be business-focused, innovative, versatile and to execute with a commercial mind-set. These attributes (and many others) have become "table stakes" for leading research professionals who look to help drive their respective businesses.

Something to snack on: The business impact of jobs-to-be-done inspired innovations

Quester, Johnsonville

Johnsonville is a category leader in leveraging jobs-to-be-done and uses the framework to feed their innovation pipeline. A deep understanding of the snacking category that transcended beyond need states was needed to uncover opportunities for the company. Karen will share how Quester's AI-powered framework helped solve the business challenge and uncover actionable insights, despite covid interruptions, to lead to both short- and long-term business impact.

Market research is an omelet, not a cookie!

MedSurvey

There are just certain things you cannot be prepared for, and you need to be open to change. Much like a recipe, researchers need to be prepared and willing to add a little or even remove certain elements, unlike baking – that is an exact science.Through the varied experience and roles that our presenters have held, they have developed some best practices based on things that they have seen make projects go well and not so well. Learn how honesty really is the best policy in dealing with research partners and how it will make your next project a success.

Show and tell isn't just for kids

QRCA Session Sponsor

Incorporating "show and tell" into qualitative sessions (both in-person and also online!) can yield rich and unexpected insights. "Show and tell" is not just for on-premise or ethnography-based work, but sparks unique benefits when building this technique into traditional methodologies like focus groups or IDIs. This method brings consumers closer to the moment of their decision-making, enables them to verbalize rich emotional benefits, and fosters rich dialogue between participants. This presentation will include tactics of how this technique can work across audiences ranging from Gen Z to Boomers, and stay-at-home-parents to physicians. Learn how to use "show and tell" beyond physical consumer products, including applications to political/societal discussions, entertainment/experiences/events, health care and more.

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The Quirk's Event utilizes the technology-enabled Klik badges and app, offering easy and fast networking in a touch-free environment. Attendees in close proximity can quickly exchange information simply by both pressing and holding down the bottom of the badge. Bright LEDs will illuminate and flash, letting you know that the information has been exchanged. All your connections are stored in the app, allowing you to chat and reach out.

MR Jam Session

Check out the MR Jam Session for a fun evening of music and mingling. Quirk's will bring together a talented collection of MR industry musicians to perform a range of hit songs. The MR Jam Session is a great way to kick off the event and is included with your registration!

cocktails WITH QUIRK'S

After the first day of the show is done, mingle and network in the expo hall and take in the experiences with other attendees. Free drinks and appetizers will be provided. Select exhibitors offer fun and tasty beverages at their stand.

Additional Networking

The Research Club and Women in Research (WIRe) will also be hosting networking parties during the event. Make sure to check out the New York Networking page at TheQuirksEvent.com to learn of all the opportunities to connect with friends old and new.

Expo Hall Celebration

During the last hour of the event, mingle in the expo hall - grab a beer or wine and stroll through the expo hall to learn and experience all of the latest and greatest the industry has to offer.

companies will acquire technology companies to improve drug diagnostics and delivery (-8% Vs. Wave 1).

This sentiment declined since Wave 1, but regardless of how tech-life sciences deals are approached, manufacturers have not stopped integrating technology throughout the marketing lifecycle. For example, Novartis has stated a strategic priority is to "spark a digital revolution at Novartis, embracing digital technologies, advanced analytics and artificial intelligence to help drive innovation and improve efficiency."

The direct impact of technological advances on consumers is less clear. This year's survey respondents do not seem to have a clear consensus on who will own the data and the degree to which the tools built upon the data will truly empower patients.

Wave 2[1] found that:

- 40% agree that consumers will have ownership/control to grant permission rights of any data (digital, electronic medical record/electronic health record) a third party wishes to access (-4% Vs. Wave 1).

As data capture continually grows, consumers are increasingly aware it is occurring, given the personalization of ads and more public acknowledgement of how that data is being utilized. With the advent of blockchain technology, it can be conceived that an individual can control each website click or credit card swipe purchase. With legislation like GDPR in the EU combined with the technological ability to control bits of individual data, the future of data control and ownership could be very different than today. This could change the face of health care patient research and data analytics significantly. On one hand, the data could become more granular in understanding a specific patient. On the other, large data sets could be a thing of the past as a researcher may only have access to opt-in patient data platforms.

Regardless of who controls the data, there is even lower agreement that patients will be able to leverage it to make their own health care decisions.

Wave 2[1] found that:

- 35% agree that technology companies are providing patients with the means to make decisions about their health care independent of HCPs (n/a Wave 1).

This speaks to the recognition that technology is unlikely to be a surrogate for the human HCP. In other words, patients may continue to consult Google, Alexa and their smartwatches for insights into their health, but only to a degree.

Finally, while the pandemic may have paused more traditional in-person engagement, it has had the opposite effect on telemedicine, which was forced to grow up fast during COVID-19. Though telemedicine is not likely to remain the primary channel for HCP consultation, it has since gained long-sought acceptance by consumers, providers, regulators and payers alike to fill a need outside of the office visit. Some HCP practices are now adopting a hybrid model whereby a patient has the option for in-person and virtual visits.

Hence, survey responses[1] should come as no surprise:

- While only 17% agree that telemedicine will result in overall decrease in quality of patient care, 30% disagree with this statement (n/a vs. Wave 1).

As technology continues to change how health care decisions are made, where and from whom consumers find health care information, where care is delivered and whether/how much of a treatment is paid for, insights professionals will play a critical role in monitoring these trends and adapting how we gather insights to account for them.

Impact of technology

In summary, Wave 2[1] gives insights professionals a lot to consider, both in terms of the markets we are charged with understanding and how we go about generating that understanding.

With respect to HCP engagement, this means being aware of the impact technology (whether more advanced electronic medical record platforms, clinical decision-making tools or digital media sources) has on HCP awareness and treatment decision-making. It also means continuing to listen closely to the voice of the customer to understand ways in which technology and the emergence of new sites of care either help or hinder HCP practice of medicine.

In the words of Robin Verlinde, head of customer engagement North Europe, Sanofi:

"With sites of care expanding, pharma will be forced to make tougher choices and balance relationships with a broader set of stakeholders, but in doing so they should not forget the health care professionals they have been engaging with for years. Becoming a true partner and offering insights-rich solutions that help HCPs to navigate the changes might create a strong, mutually beneficial relationship."

For helping patients, we will need to keep channels front and center, e.g., apps, social media support groups or even tried-and-true printed resources through which patients learn about and engage with new treatments. It certainly means understanding where and in what circumstances they seek care. As insights professionals know, clear understanding of patients is what guides the work we do.

Our search for answers, collaborative spirit and drive to improve will ensure we emerge stronger, smarter and are leading the changes that come next. At Intellus Worldwide, we work together with hundreds of community members to discuss our common challenges and the latest advances in health care insights and analytics that empower us moving forward. To become an Intellus member and be part of the next crucial opportunity to build professional networks and develop collective solutions, visit https://www.intellus.org/.

Look for Wave 3 results in late 2022!

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REFERENCES

1 Sessions exploring the findings from the Wave 2 survey are available on demand for members. Visit https://www.intellus.org/become-a-member to become a member or to access the Intellus Worldwide's Video Library https://www.intellus.org/Member-Resources/Virtual-Learning-Center

••• health care research

Changing practices

Has the pandemic forever altered doctors' views of pharmaceutical detailing?

| By Richard Vanderveer

snapshot

Using conversations to study the psychology of physician engagement with pharma companies.

New marketing challenges often require the use of new approaches to marketing research. For example, using free-flowing conversations as the data collection technique and the psychology of habit as the analytical framework, it becomes possible to deal systematically with an emerging pharmaceutical marketing environment, even if "We don't know what we don't know."

More specifically, recent years have seen a reduction in the willingness of physicians to spend their time being detailed by pharmaceutical sales representatives (PSRs). This trend was significantly accelerated by the COVID-19 pandemic, as its required multi-month cessation of personal visits by PSRs to doctors' offices caused doctors to reconsider their long-standing habit of allowing – and often encouraging – such visits. To fill the void during these lockdown months, pharmaceutical companies turned to "virtual details," with PSRs "visiting" with physicians via Zoom and other videoconferencing platforms. During that time, companies also placed a greater reliance on e-mails, phone calls, etc., to keep in contact with physicians.

Throughout the pandemic and moving into the post-pandemic period, we have been having monthly conversations (see below) with office-based physicians, primarily high-prescribing specialists, studying the backstories of their various forms of engagement with pharmaceutical companies. Increasingly, articles in the trade press and reports by major consulting firms are recommending the use of artificial intelligence to customize and personalize companies' engagements with physicians. But, to take meaningful steps in this direction, companies need to understand the psychology of engagement. What are physicians looking to accomplish through their engagements with pharmaceutical companies? How satisfied are they with current offerings? What additional forms of engagement would they like to be offered?

Understandably, discussions with our clients have revealed that many of them are uncertain about the changes they are seeing in the marketplace. Of particular concern to many of them is the risk of reinstituting personal

forms of engagement with the possibility that new coronavirus variants will once again lead to lockdowns. Of even greater concern is the possibility that, as a result of the pandemic, physicians' preferred forms of engagement may have changed permanently. Keeping pharmaceutical marketers abreast of these changes is the purpose of conducting the On Doctors' Minds (ODM) conversations on a monthly basis throughout 2022.

Get out of the way

To meet these information needs, we have found that conversations with physicians is the best methodology to employ. These conversations, typically conducted by a psychologist, are significantly more open-ended than even individual depth interviews. The philosophy here is that when you understand very little about the dynamics of the situation under study, it is best to simply get out of the way and let those who are actually involved in the situation do the talking. While focus groups can also serve this freewheeling purpose, that methodology does not readily allow for the identification of significant customer segments which were hypothesized to exist here and are in fact emerging.

Procedurally, physicians are recruited for individual one-hour Zoom sessions. Potential discussants are asked to authorize the viewing of the Zoom recordings by clients, thus allowing pharmaceutical marketers to hear directly from their customers in an "open mic" environment. Rather than following a traditional topical guide, the flow of these conversations begins by our simply and honestly telling the discussant what we are looking to accomplish during the call. In this case, doctors are told that we are looking to get a thorough understanding of the kinds of interactions in which they are currently engaged with pharmaceutical companies.

To provide guidance as a place to start this process, we ask each doctor to begin by telling us what engagements she has had with pharmaceutical companies in the last week. As that information is forthcoming, the doctor responds to probes of clarification (What do you mean by that?) and extension (What else?) to develop an overall understanding of the physician's current pattern of engagement, her satisfaction with its various elements, how this pattern has changed as the result of the pandemic and how she would like pharmaceutical company offerings of various forms of engagement to change in the future to better meet her needs.

By using this conversational technique in which the physician drives the flow, the analysis of the resulting video recordings lets us get in touch with new insights that otherwise would be hidden from us even in an individual depth interview, where the interviewer determines the flow of the conversation and imposes her own terminology through the asking of specific questions. This conversational approach permits more organic forms of analysis to develop insights that include:

Salience: In what order does the physician introduce topics for discussion and how extensive are her comments on each topic? Topics of greatest importance to the physician are typically talked about earliest and longest in a conversation.

Emotion: What is the physician's body language as a particular topic is discussed? Where is there positive affect and where is there negativity?

Terminology: What words does the physician use to describe the various forms of engagement and her reactions to them?

Dynamics: In what ways has the physician's participation in, and attitudes toward, various forms of engagement with pharmaceutical companies changed as the result of the pandemic?

Segments: What segments exist in terms of physicians' utilization of, and attitudes toward, various forms of engagement with pharmaceutical companies?

Readers wanting to listen to a short example of a conversation conducted for this project can access it here: https://bit.ly/38ODM22.

Numerous learnings

The ODM project is still ongoing monthly, so the final results are not yet in and won't be for a year or more. However, numerous learnings are already available. Some of the most important include:

Longstanding physician habits pertaining to engagement with pharmaceutical companies were forced to be reconsidered as the result of the pandemic lockdown.

Without doubt, the most important finding of this project is that the decades-long habit of physicians willingly having regular, in-person visits by pharmaceutical sales representatives was put on hold by infection control requirements in doctors' offices and by company policies that pulled PSRs out of the field. This hiatus, in turn, has resulted in physicians reconsidering this form of engagement and the amount of time that they are willing to dedicate to interacting with PSRs in particular and pharmaceutical companies more generally. In brief, the months-long absence of PSR office visits, as well as pandemic-induced pressures on physicians' time, reelevated time allocation to the executive mind, where active consideration and scrutiny were given to what once was easily managed in the habitual mind.

Importantly, many doctors are quick to explain that the pandemic's impact in this regard was simply to hasten a trend that had already been underway for several years. This trend, as doctors explain it, was toward their increasing resistance to subjecting themselves to repetitious promotion of products through presentations that bring no new information. While the pharmaceutical industry called such presentations "reminder details," doctors called them annoying.

Over the course of the pandemic, and now into the post-pandemic period, physicians have developed new engagement habits.

In continuing to study the psychology of engagement, it has been fascinating to hear about how a particular physician's habits in this area are logical and consistent with what that doctor is looking to accomplish through the engagements.

For example, physicians are, across the board, understandably interested in making the best use of their time possible. The pandemic found doctors having to quickly adapt to telemedicine, to new in-office safety procedures, to staff outages due to sickness, etc., thus causing a newly sharpened interest in getting full value out of every practice minute invested in an activity. Interestingly, for some physicians, this interest translates into a preference for traditional in-person PSR visits. As these physicians see the situation, they can control the length of personal visits by communicating through body language and, if necessary, pivoting on their heels and walking away when a PSR has overstayed his or her welcome.

Conversely, other physicians prefer virtual presentations based on the same interest in controlling their schedules. For them, virtual presentations are preferable since they are prescheduled, allowing the physician to set aside the appropriate amount of time for such an engagement and to fit it into their schedules without PSRs being allowed to show up without an appointment, thus interrupting the physician's workflow.

Physicians are increasingly intolerant of social chatter and other "wasted time."

Quite simply, most doctors are looking for the efficient presentation of important new information and/or for the delivery of services that can help them help their patients. There needs to be a quid pro quo for the time the physician invests in any engagement. Period!

Physician segments are emerging that differ significantly in terms of their preferred interactions with pharmaceutical companies.

While some doctors eagerly looked forward to the return of the "good old days," replete with PSR personal visits, copious supplies of samples and lunch provided for the office staff, others welcomed the advent of virtual details, considering them to be much more efficient than personal visits. Also frequently encountered are hybrid physicians who prefer longer, sit-down discussions, quite often with medical science liaisons (MSLs) for the introduction of a significant new product, while seeing virtual details, typically with PSRs, as being more efficient for less in-depth discussions. Many physicians report that they value the MSLs' ability to answer more complex questions than can the PSR. They are often frustrated by PSRs' inability to get into a more clinical, case-based discussion, while MSLs have more latitude to address physicians' practical questions.

Underlying these differences, we have found that physicians are looking for PSRs, and more generally pharmaceutical companies, to play different roles in their practices. On the one hand, physicians in primary care, solo practice and in more rural settings appreciate both the new information and the samples that PSRs provide. On the other hand, physicians in academic practices often rely on their colleagues for the exchange of new information rather than on PSRs, whose visits are in some cases blocked by institutional policies. These same physicians often have little use for samples, which are in many cases also forbidden by the academic institutions in which they practice. The result is that designing engagement programs for such physicians can be especially challenging. This is a situation where pharmaceutical companies need to engage these high-level HCPs/key opinion leaders not through PSRs but through establishing their interactions with company MDs and PharmDs and other sources of clinically useful information.

We would be remiss if we did not report that while most physicians want to avoid social chatter with their PSRs, as discussed above, a relatively small segment of doctors exists who genuinely and enthusiastically value their friendships with some of their PSRs. Such social bonding does not occur overnight. Rather, the doctors who reported such friendships tend to be older, thus permitting them to have been serviced by a stable cadre of PSRs who had provided them with good service "for years." In these same practices, it is important to note, the doctors also identified younger "pass through" PSRs who were seen only once or twice before disappearing.

Most physicians view their engagements with the pharmaceutical industry as being product-focused not company-focused.

Despite many pharmaceutical companies' belief in the importance of corporate image, most doctors honestly report that in general, they have little awareness of who makes what. Thus, when they speak about a PSR, they not infrequently call her "the (product) rep,"

NOT "the (company) rep. Relatedly, physician perceptions of categories of pharmaceutical companies are often rather simplistic, e.g., big companies (Merck, Pfizer, etc.) vs. small companies.

Our conversations with physicians in the 2022 iteration of our ODM project revealed that the association of corporations with their products, let alone the development of anything resembling loyalty to a company, does not happen automatically as the result of routine product promotion. Rather, something heroically above and beyond routine exchanges is typically required for physicians to take note and respond to this perception. Here, Pfizer's work on COVID-19 vaccines is seen as heroic enough to earn it special mention by physicians in terms of corporate image. Little support was heard from physician comments, however, for the notion that this image was resulting in corporate loyalty or increased use of other Pfizer products.

Several other examples of outstanding behavior on the part of pharmaceutical companies were heard in the current round of conversations. One neurologist, for example, was quick to identify Biogen as a company that is "doing a great job" for him. Why? Simple! The Biogen financial assistance program for patients is seen as being generous, easy to access and transparent. The upshot of this, the doctor went on to explain, is that if there are two virtually equivalent products and Biogen makes one of them, his positivity toward that company will make him choose its product.

Another and very different cause for a physician to become corporately aware and loyal was found in our conversation with an office-based dermatologist. This doctor reported that he is an active participant in the speaker programs of several pharmaceutical companies. Such participation, we found through conversations with other physicians in our project, understandably often weds a physician to the companies for which he or she is a frequent and regular speaker.

But this doctor offered further explanation of the power of participating in such activities. In the two weeks prior to our conversation, the doctor reported that he had participated in two Zoom speaker training programs. One of these was five hours long. He received a check for $5,000 for his participation in that seminar. The other was eight hours and resulted in him receiving a check for $8,000. In case we had missed the point, he went on to note that put together, these two sessions had netted him a total of $13,000. Not surprisingly, he had no difficulty in recalling what two companies had provided this largesse. Equally unsurprising is the fact that several other physicians reported to us that they are far more prone to participate in programs for which they are compensated.

A segment of physicians exists whose engagement with pharmaceutical companies revolves mainly around food.

As we saw in the findings of ODM v1.0, v2.0 once again has found a segment of physicians who routinely hold PSR-sponsored lunches in their offices three to five days each week. Such sessions have typically involved the entire office staff, permitting physicians, nurse practitioners, physician assistants and nurses alike to enjoy a convenient lunch and to be exposed to the message delivered by the PSR. Such lunches are valued by physicians, who see them as a great way to reward, at no cost to them, their hardworking and typically underpaid staffs.

Even during the height of the COVID-19 pandemic, when no PSRs were allowed into physicians' offices, the use of Uber Eats to deliver lunch and a computer set up in the lunchroom to permit the PSR to deliver her message via Zoom or a similar platform got the job done for this segment. Now that offices are largely opening back up, most lunch-dependent practices have returned to in-person sessions.

However, the pandemic has fundamentally changed the promotional opportunities these luncheon encounters provide. More specifically, prior to the pandemic, a luncheon buffet was typically arranged by the PSR. The staff would come into the room at the appointed time and sit down to eat their lunches together. This setting allowed the PSR to make a quality presentation and to have the staff participate in a discussion so that everyone left with a shared understanding of the message that had been delivered and how it applied to treatment in that office. Post-COVID-19's arrival, the rules have fundamentally changed. Now food is preordered by individual staff members and comes prewrapped. The result? The PSR only gets a minute or two to interact with individual staff members as they come in to pick up their lunches and there is absolutely no opportunity for group discussion of the presentation's contents. Thus, it could be cogently argued, the majority of the promotional essence of the luncheon encounter has been stripped away.

Moreover, since physician offices that host such lunches typically do so three to five times each week, with PSRs from multiple companies competing for available slots, it can also be argued that no company is gaining a reputational advantage through lunch sponsorship.

Understood as habitual

At the bottom line, approaches like the ODM project help us learn that an individual physician's engagement pattern with pharmaceutical companies is best understood as habitual. Doctors are not making engagement decisions on a one-off basis but rather are developing predictable, habitual patterns of behavior. They are anxious to participate in some forms of engagement and to avoid others.

As a closing note, the work reported above constitutes more findings of an initial investigation than of a study. Small sample sizes, and the conversational research style employed, inherently limit generalizability of findings. However, the search for insights as to how the pharmaceutical industry should deal with fundamental shifts in physician engagement patterns and preferences needs to start somewhere. Through the work reported to date, and through other aspects of our ODM project, we are looking to produce the following outputs: a better understanding of the psychology of physician engagement; a lexicon of the dimensions on which physicians' utilized/preferred engagements can be profiled; and a series of physician personas that characterize segments of physicians based on their habits of engagement. These and other insights will be essential in helping pharmaceutical companies to respond to the rapidly changing field of physician engagement.

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••• brand research

Escape from Nightmare Alley

How research can help CMOs and brand managers sleep better

| By Robert Passikoff

snapshot

From conjoint to expectation research, Robert Passikoff outlines the research tools that will keep a host of current worries at bay.

COVID-19 has had consumers, supply chains and brands under siege for three years. Social activism and political tribalism have never been higher. Emerging technologies like AI and the metaverse and the unrelenting quest for marketing ROI are some of the worries keeping marketers up at night, according to a recent Brand Keys Marketing On My Mind survey.

Thirty percent of marketers' bad dreams are new to the 2022 list of problems receiving mentions by 75%+ of the 407 CMOs and brand managers who participated in this year's survey. Marketers' nightmares include dealing with COVID-19 issues, product availability (or lack thereof), inflation, optimizing CX, brand engagement and dealing with ever-increasing customer expectations. And, of course, the bogeyman of marketing, return-on-investment, always No. 1 on marketers' lists.

Brand Keys asked CMOs and brand managers, "What issues keep you up at night?," with the following results. Percents indicate frequency of mention, numbers following indicate changes from pre-COVID 2019.

1. ROI and ROMI (98%, +1%)
2. COVID-19 and pandemic-related employee management issues (95%, new)
3. Supply-chain snafus and product availability (94%, new)
4. Inflation (92%, new)
5. Competition from new brands (91%, new)
6. Addressing innovation, AI, technology, the metaverse and marketing automation (91%, -1%)
7. Optimizing and owning CX and the customer journey (90%, new)
8. Establishing trust between my brand the consumer (90%, -5%)
9. Consumer expectations regarding privacy, transparency and corporate social responsibility (90%, –)
10. Deployment of predictive consumer behavior analytics and technolo-

gies (90%, +4%)
11. Proliferation of digital channels (89%, new)
12. Developing long-term/new strategies that align with corporate growth goals (88%, +8%)
13. Keeping consumers engaged with my brand (86%, +11%)
14. Managing agency relationships (84%, new)
15. Creating relevant and engaging advertising content and storytelling (83%, -5%)
16. Growing consumer expectations and the gap between consumer desire and brand delivery (83%, +1%)
17. Dealing with consumer tribalism and political dogma (82%, +5%)
18. Data security issues (80%, -15%)
19. Dealing with consumer advocacy and social activism (80%, -5%)
20. Protecting my brand's equity (80%, +1%)
21. Creating an "unlearning curve" to move away from legacy marketing metrics (79%, +4%)
22. Being replaced by a chief revenue officer or CFO (77%, +2%)
23. Better cross-platform synergy for brand marketing (75%, --)
24. Creating marketing synergy among different generational cohorts (75%, --)

Make sure research has adapted

COVID-19 has changed consumers and the marketplace forever. To help get a better night's sleep, CMOs and brand managers need to make sure their research has adapted to those new consumers in this new marketplace. This is particularly true about brand engagement, #13 on this year's list, but one that connects to many other nightmare scenarios because emotional brand engagement is the 21st century paradigm for loyalty, which is something that keeps all marketers from getting a good night's sleep.

Serendipitously, targeted research and marketing insights have a marvelous way of mitigating nightmares. Researchers need to take a hard look at methodologies dealing with consumer-to-brand emotions because the consumer decision process has become far more emotional than rational. Real loyalty assessments, for example, measure the emotional engagement between the consumer and brand versus the consumer's perception of their category ideal. The best research will measure what consumers really expect. Brands that measure up always see loyalty. Those engagement levels can also be used to identify differences between loyal customers and casual customers or someone just buying out of necessity, all of which provides CMOs and brand managers with sleep-aid insights in a COVID-19-converted marketing arena. Emotional brand engagement research will vary from category to category but it is a predictive measure of positive consumer behavior toward a brand. And a leading indicator of ROI.

ROI and ROMI are #1 on marketers' lists of nightmares but happily they can be research-addressed in several very effective ways. A good first step would be to analyze the outcome of past marketing efforts to identify and define which marketing activities showed positive returns and which efforts did not add meaningful value. Modern technology and analytics make it much easier to conduct both quantitative and qualitative ROI analyses.

Applied right now

New research technologies will ultimately help analyze the performance of individual marketing activities but readily available research techniques can be applied right now. Most marketing KPIs can be measured daily, making it much easier to analyze effects of each indicator on the marketing ROI. Marketing mix modelling is an econometric analysis used to attribute past sales to the contributions from changes in differing attitudinal and behavioral causal drivers. Conjoint research allows marketers to link specific perceptual brand attributes to changes in brand preference and brand choice. Driver analyses allow individual attributes to be categorized into groups either through statistical analysis, e.g., factor analysis or logical grouping, a data reduction analysis which can identify a smaller number of statistically independent factors that a CMO or brand manager can leverage. Both for better sales and a better night's sleep.

Supply-chain snafus and product availability issues have led to the appearance of embryonic brands, new to sectors and new to established brands. Dealing with competition is part and parcel of brand marketing and management life. But today's CMOs and brand managers have expressed worries about "new brands." The nightmare that has taken on monster-in-the-closet status is "keeping consumers engaged with my brand," which increased 11% from 2019. Combine that increased brand expectations and the terror of new brands entering the marketplace and you can understand why CMOs and brand managers face sleepless nights.

Competitive market research can focus on finding and comparing key market metrics to help identify differences between a brand's products and services and those of the competition. Comprehensive market research can help establish the foundations for effective sales and marketing strategies that can help a company differentiate products and services, engage consumers, and increase sales and profits.

Competitive research can be conducted for both old and new competitors to provide evaluations of brand and product strengths and weaknesses and identify threats and opportunities that can help create an environment for a more restful night's sleep.

Competitive research can help identify your brand's point of differentiation, unique selling proposition, value proposition, brand equity. Call it what you will, but well-designed market research can inform CMOs and brand managers of what they can do to keep their brand relevant and profitable. Nothing provides CMOs and brand managers with a sense of peace than when they know where their competitors are falling short – and they aren't!

Faster than brands can keep up

Bad dreams regarding optimizing and owning CX and the brand's customer journey can be allayed with research that addresses consumer and customer expectations. Awake or asleep, marketers' anxieties regarding expectations are very real because expectations grow at the speed of the consumer and generally faster than brands can keep up. Research has shown there's an enormous gap between what consumers truly desire and what they see brands delivering. Expectation research can identify that gap. That expectation gap presents a strategic opportunity. And what should put managers' minds to rest is the fact brands that best meet expectations are always category leaders with largest shares-of-market and, axiomatically, the largest profits, which also addresses ROI issues.

Data science permits brands to apply a wide range of research skills to analyze data from various channels, which provide brands with actionable insights to enhance personalization and customization, deliver more relevant advertising and recommendations and improve the overall customer journey. Research has shown that 86% of customers are more likely to purchase from a brand that provides them with a personalized experience and presents them with relevant and customized offers and recommendations.

Technological innovations – including AI, decision intelligence and machine learning and the metaverse – are all poised to transform the marketplace. Uncertainty makes marketers uneasy and creates a foundation for bad dreams. Research can help identify market trends of end-users seeking specific technology capabilities and can identify how brands can best use them. Applications research can identify where and when marketers should shift focus. Modern data platforms and AI-driven technology allow brand managers and CMOs to identify and use multi-source datasets to uncover what the customer is really looking for, much like Netflix recommendations of new content based on past activity. The metaverse is a little too new to identify effective research recommendations. That said, tech-based research insights can be converted to more-certain, actionable recommendations for increased consumer engagement and more effective and resonant content. Certainty (or just a little more certainty) has a way of reducing complexity and maximizing marketing efficiency, another set of items sure to scare away night terrors.

Comfort and confidence

It's been said of all the things you choose in life you don't get to choose your nightmares. But the scope and effectiveness of research methodologies available today should provide CMOs and brand managers with some comfort and confidence and a few more evenings of nightmare-free sleep.

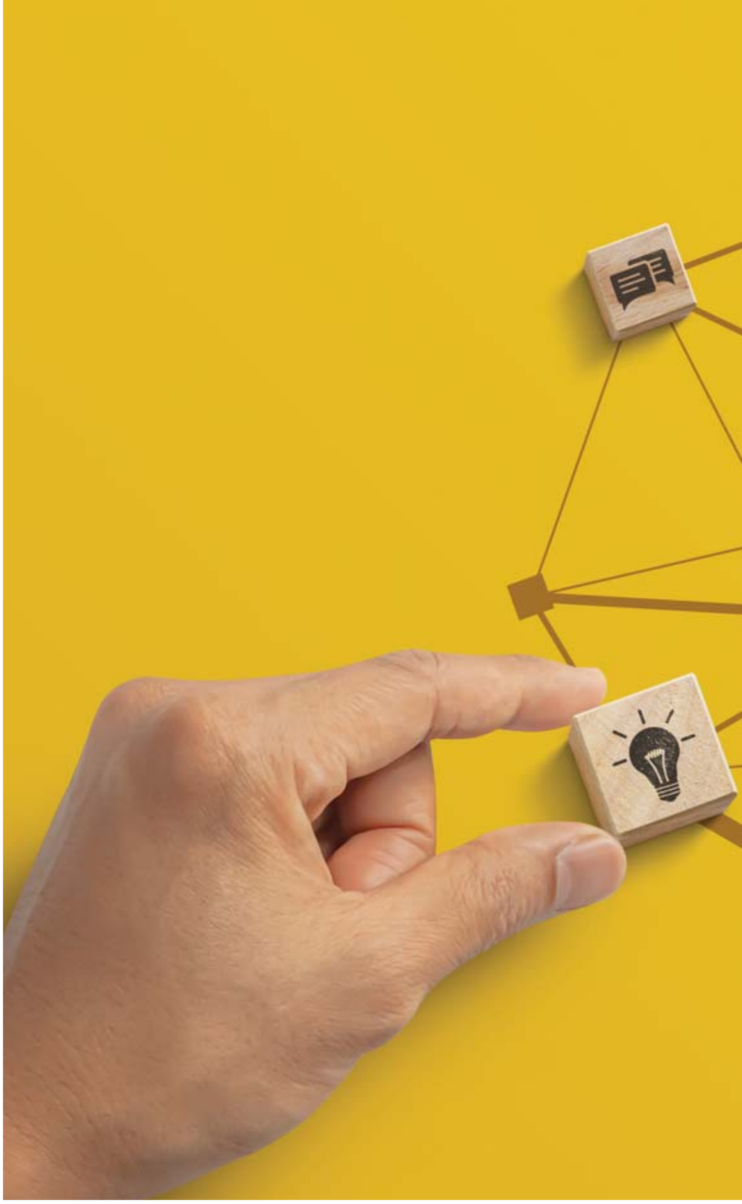
Robert Passikoff is founder and president of Brand Keys Inc. He can be reached at robertp@brandkeys.com.

••• brand research

Connecting on a deeper level

How brands can form bonds with our brains

| By Sandeep Dayal



snapshot

Cognitive branding calls for a revamp of research methods and mind-sets.

Advances in behavioral sciences and neuropsychology have given marketers a whole new level of understanding of how the human brain makes choices. We know that branding is all about influencing consumer choice. It always has been. Thus, you put the two together, you go "voila!" Brands that leverage this new knowledge have a chance to be truly epic.

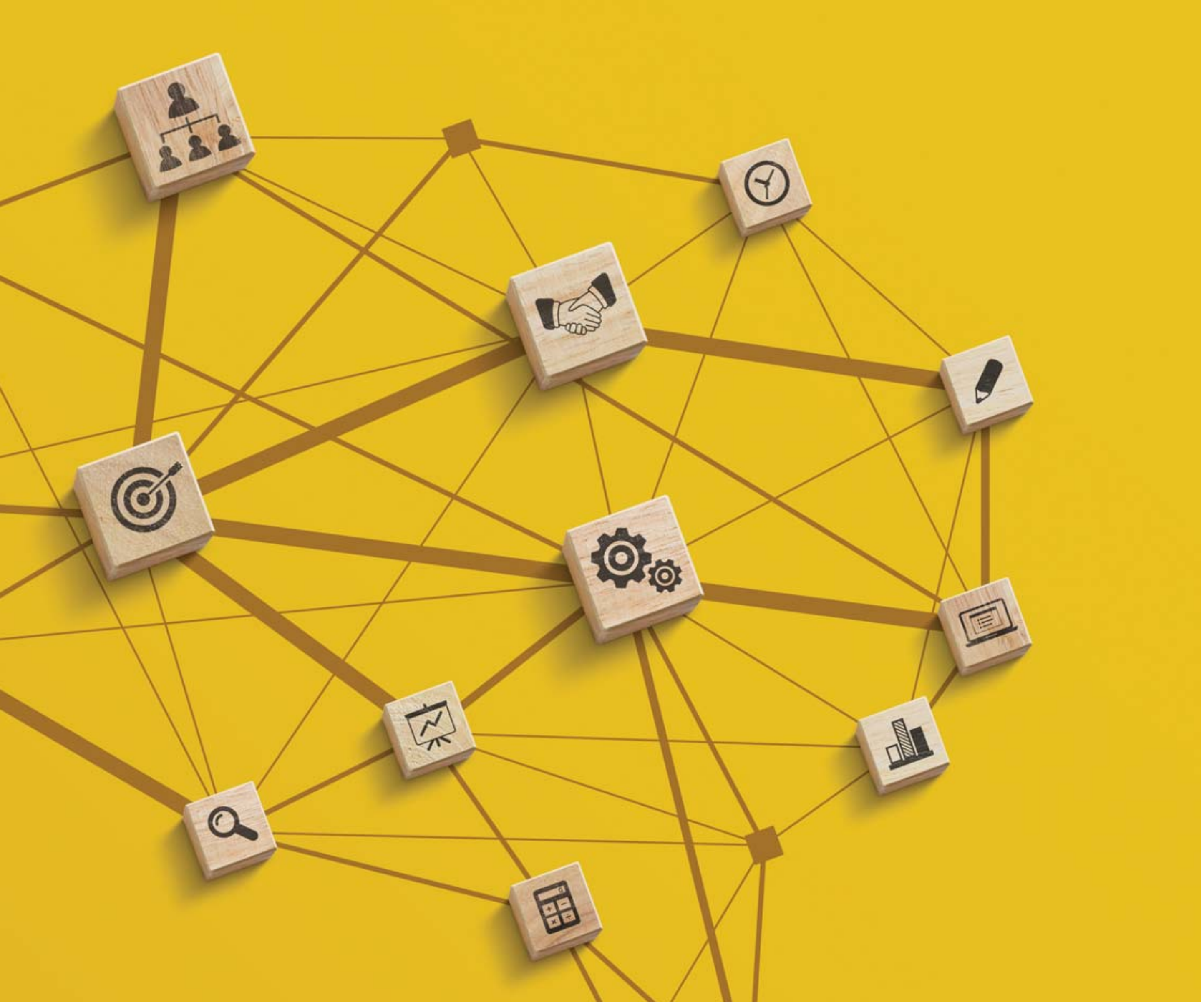
What I call cognitive brands are brands that are designed to work the way our brain does. They act as keys that unlock sensations of past experiences or fantasies that live consciously or subconsciously in our minds. Those sensations are in fact thought patterns and rules that we live our daily lives by. Decoding them gives us powerful pathways for positioning our brands.

But how do we do that? How are thoughts different from brand equities or product attributes? What kind of qualitative and quantitative research can help us understand them?

Not the same

The first thing to recognize is that thought patterns are not the same as product attributes or emotional equities. When we interact with brands, there are certain thoughts that cross our minds, consciously and subconsciously. Researchers claim that 95% of the decisions we make are done subconsciously or with low vigilance. How does that happen?

As we go through our lives, we start planting certain rules in our brains, hundreds of them, which are simply our learnings from all our experiences. For example, if we have seen that products that are really



cheap, often break and are costly in the long run, our brain makes a little rule that says “cheap = bad.” When we see a cheap product, we assume it’s bad and don’t buy it. For some of us, the decision is made in an instant without our dwelling needlessly on it. Occasionally, that may be the wrong decision, and the cheapest product might be the best one, but generally the rule works well for us and we use it over and over. Other people may have a different rule.

In this way, the challenge for the market researcher then is how to uncover the rules that the targeted consumer is using to make brand choices in their category.

Three elements

My research has shown that there are three possible elements in a cognitive brand: I call them brand vibes, brand sense and brand resolve. I say “elements” because they are a part of the brand that says something about its nature.

- Brand vibes build a unique bond between the consumer and the brand such that they feel that it understands them or shares the kind of values they have. They allow marketers to create “brands with empathy” and “brands with values.”
- Brand sense helps consumers make instinctive or reasoned sense of their choices using System 1 easers or System 2 deliberators, respectively. This dual processing model of the brain’s processes is best described by psychologist Daniel Kahneman.
- Brand resolve helps consumers consider whether it is all worth the bother and prompts them to buy the brands that would make them happier. This is through a psychological process of intrinsic goal pursuit.

So, how can market researchers and customer insight experts get to these elements?

Coherent idea

The first step in any brand strategy is to develop the richest possible set of distinct brand ideas. Each brand idea may have its own vibes, sense and resolve. Together they form a coherent idea that will consciously and/or subconsciously appeal to the consumer.

Psychologists and behavioral economists have identified over a hundred different cognitive biases, such as the choice supportive bias, Occam’s Razor bias and anchoring bias. I like to refer to them as cognitive wisdom rather than biases. They are simply the rules that consumers use to make sense of their brand choices. You can start with their list (easy to find on the web) and identify the seven or eight that might fit with your product category.

Similarly, cognitive behavioral therapists have identified numerous ways in which patients deliberate on their issues and subsequently change their behavior positively. Those same methods are useful for brands that need conscious choice adjudication for driving preference. The list of these methods are also available on the web easily.

The best way to validate which of the seven or eight concepts might work is qualitative research. There is no great substitute for the insights that emerge from one human talking to another. I recommend that researchers use a variety of methods, i.e., in-depth discussions, focus group discussions, metaphor elicitation studies and ethnographic observations. They each have limitations but also yield their own unique insights.

With the advance of AI and machine learning there are additional options for using natural language processers to monitor consumer sentiment across a broad range of blogs and online interest groups. But it is important to go beyond your category.

When Unilever was introducing Dove soap, it found that the real angst that women felt was that cosmetic brands in their commercials always depicted super-thin, perfectly beautiful women that most could never hope to be like. It made them feel worse about their own bodies and turned them off and away from those brands. This led Unilever to the "Real Beauty" campaign for Dove that featured women with normal bodies, thinner or heavier, younger or older and lighter or darker.

The campaign did mention Dove but not how it was better than other soaps and body washes. Yet, it became the No. 1 in its category across many markets in the world with the campaign. And if Unilever marketers had only talked about the quality of the soap and not gone broader into the vibes that women felt from the cosmetic brands in general, it would have lost that incredible opportunity to build a brand with empathy as it did.

Things get tricky

Once marketers have identified cognitive branding concepts, they need to do quantitative research to identify which will be the one they go to market with. This is where things get tricky.

Brand research has for the most part been designed to test for the importance of specific product attributes or emotional equities. Those are then knit together into some kind of a thought or tagline. However, that is misguided, as the brain processes concepts and arguments as thought patterns and not as individual equities.

Thus, research methods must focus on testing entire concepts with brand vibes, sense and resolve elements all knit together as a coherent bundle. Some companies have already ventured into the arena of neuromarketing to measure consumer reaction as they are exposed to a concept.

It is tempting to ask if there is a way to stick a probe through customers' ears and get a true reading of their thoughts and intent, maybe even the subconscious ones that they are not aware of. For marketers, that would be nice and convenient. With advances in brain science, there are many different tools for peering into the brain. You can strap consumers to electronic devices, expose them to a brand stimulus and see what lights up. While these techniques are still not completely developed, there is enough underway that it is worthwhile for marketers to start dabbling in such research and get their feet wet. New Balance, the shoe company, now routinely uses such tools to fine-tune its commercials.

The neuromarketing techniques range from eye scanners, which detect what part of visual stimuli the consumer focuses on and for how long, to functional magnetic resonance imaging (fMRI), which can see which parts of the brain activate by measuring blood flow.

Despite these technological advances, we are far from reading anybody's mind. And don't hold your breath because we are not about to get there anytime soon. Even with the most advanced brain scanners, we can see that there is something going on in the brain but interpreting what exactly it means is a whole different matter. You may see that a subject is having an emotional reaction to your ad but you can't tell what the emotion is or even if it is positive or negative. Research shows that the brain does not have hundreds of distinct neural areas dedicated to interpreting the multitude of emotions we feel. Instead, there may be just one core effect that we feel, which is interpreted by the brain in a thousand different ways based on context.

In certain limited scenarios, researchers have had phenomenal success with neuromarketing-based methods. Researchers at Emory were able to predict a song's future popularity more accurately by observing fMRI signals within subject brains than by simply asking them how much they liked the music. Similarly, a team led by Moran Cerf at Northwestern was able to predict the future success of movies with 20 percent greater accuracy than traditional methods by using EEG readings of audience members.

So, yes, there's something there. If you have the budget, it is worthwhile for you to figure out which areas of your marketing research can benefit from neuromarketing. But don't ditch your conventional research anytime soon.

Additionally, with the advance of AI-based methods, new analytical approaches for causal analysis are becoming available that need closer attention for applying to cognitive branding. Even some old tricks, like presenting consumers a concept and asking them to highlight the phrases that appeal to them, can sometimes give good insights. Just because it is old, does not mean it cannot work.

Need to be creative

The field of cognitive branding is opening up. Market researchers and customer insight experts need to be creative in drawing on a mix of tools and methods to get inside consumer minds. The good news is that there is a lot of that already available. The real question is whether the researchers are ready to shift their own mind-sets away from the illusions of the past.

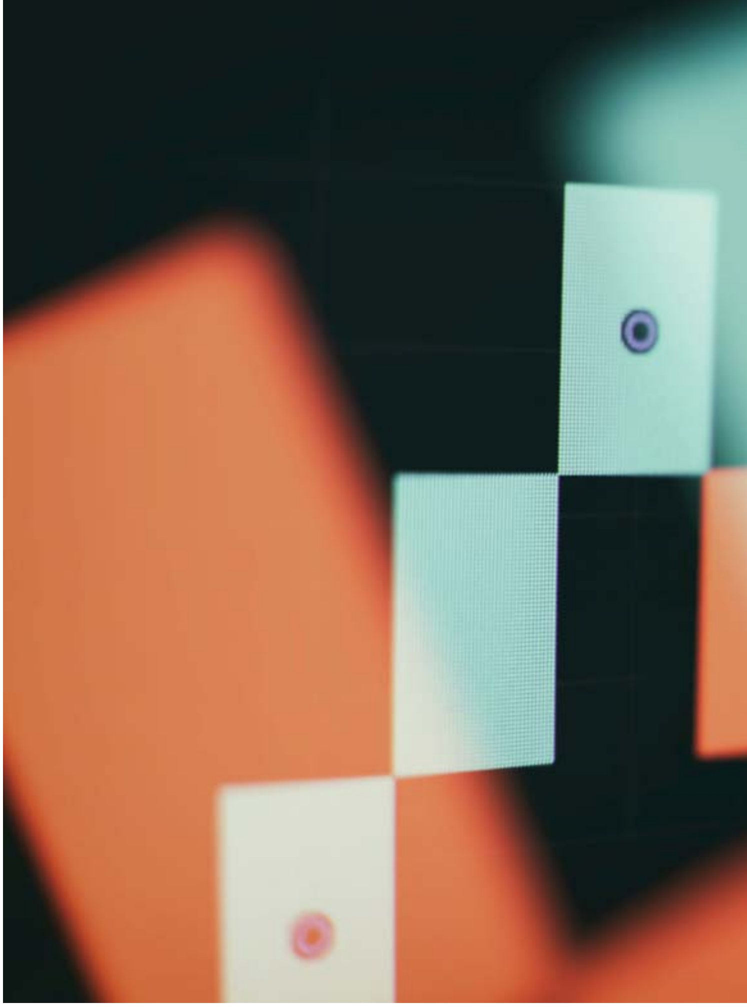
Sandeep Dayal is managing director of Cerenti Marketing Group and author of the new book "Branding Between the Ears – Using Cognitive Science to Build Lasting Customer Connections."

••• tracking studies

Let's get tracking

A how-to guide for market, brand and advertising tracking studies

| By Elliot Savitzky



snapshot

Part 1 looks at the reasons for conducting tracking research and the types commonly used.

Brand, advertising and market tracking are vital to the success of any business, whether it be a fast-food franchise or a utilities provider. If you don't know what's happening in your particular sector of the market, how can you plan, strategize and future-proof your or any business?

For marketers, those of you entrusted with generating and acting upon market data, it is critical you have a complete understanding of tracking studies.

To help with this, our how-to guide for tracking studies has been divided into three easily digested sections that will provide you with all the information you need. In this issue in Part 1, we will cover the reasons for conducting tracking research and provide detailed descriptions of the principal trackers used. In Parts 2 and 3 next issue, we will cover key metrics, how to control variables, how to analyze data and, of greatest importance, how to effectively report the findings of any analysis.

While methodologies have evolved and adapted – from landline phones in the old days to online panels today – the desire and need to frequently, if not constantly, monitor a market remains necessary to provide relevant input to the executive dashboard and is the standard by which the performance of marketing teams and agencies are evaluated.

So, why conduct a tracking study? Are you concerned about your position in the competitive landscape? Worried about brand equity? Are you about to launch a new ad campaign? Are you planning to introduce a new product or line extension? Have you revised your product formulation? Do you want to test a heavy-spending media plan? Are you going to test the market with a new product?

All of these are valid objectives for conducting some form of market tracking. How you design and conduct a tracking program can differ and these two elements are heavily dependent on the level of commitment, the budget available and the types of decisions to be made.

No substitute

Dependent variables like trial and repeat are successfully obtained from third-party data like panels and scanner data but there is no substitute for asking consumers questions that provide softer data like attitudes, emotions and intentions in order to understand the whys around how people ultimately behave. That is where tracking studies really shine.

Biometrics may one day provide non-conscious feedback on a reliable and scalable basis online but for the foreseeable future we will still be conducting tracking studies in order to find the answers to our important marketing questions.

By the time you have read through this article, you should have the answers to the following tracking-related questions:

- How do we go about designing a program that best meets our needs?
- When do we start our tracking program?
- How frequently should we conduct the research?
- When do we stop, if ever?
- Who do we target?
- How do we find them?
- How quickly can we expect to see an ROI on our efforts?

We will be focusing primarily on brand and advertising tracking examples as we continue but the principles apply whether you are conducting tracking that relates to corporate reputation, brand health, longitudinal studies or customer experience (Figure 1).

Two key components

The answers to the above questions largely depend on two key components of your plan: what the objectives of the research are and, for brand and advertising tracking, what the media and spending plans are.

The media plan is dependent on the objectives of the program. If the plan is to conduct heavy up-spending in specific markets, then the media plan needs to reflect increased spending for the brand in those markets, relative to a set of control markets. The objectives, therefore, will dictate when, where and how to conduct your research and how your action standards for success should be created.

The first step is to determine when to conduct your research in an effort to gauge results.

Each type of tracking program listed below can be used to measure the impact of different types of objectives and will dictate the timing for in-market assessment: pre-post; pre-post, test-control; pulse; continuous; longitudinal; digital tracking; social media listening.

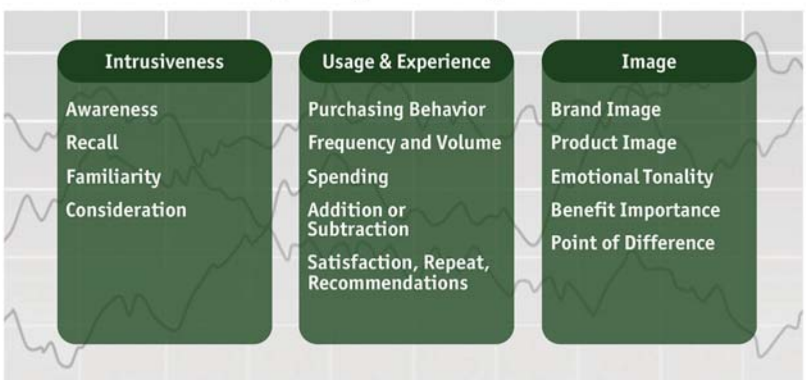
Let's discuss each in some detail.

Pre- and post-wave

In almost every situation, you are going to want to conduct pre-wave interviews in order to establish a benchmark for later performance., such as a heavy-spending program, a new campaign launch, a new product launch or just monitoring new competitive activity.

One of the most effective ways to measure the

Figure 1: Types of tracking data



impact of your marketing activities is by including control market(s), which will help to diagnose whether any pre-post bounce is truly due to your marketing efforts or if it is simply a result of the market's normal course of events.

Pre- and post-, test-and-control

Employing test-and-control markets depends on several factors including:

- Whether your program is national or regional.
- If your media plan includes a heavy-up component.
- Whether you can match other market(s) to the area in which you are tracking. By "matching" markets, you need to consider category development indices (CDI) and brand development indices (BDI) that are similar to the test-and-control geographies. CDI is applicable if you have just entered that market, BDI if you already have an established business. Most often, you are targeting high BDI or CDI markets in order to improve the probability of successfully predicting the response of target groups in those markets.

In the case of any advertising tracking study, the media plan becomes an integral part of the timing of the interviewing. This should go without saying, but many times I have seen advertising testing programs where the ad spending for the brand in question was nowhere near what competitors were spending. There is no real chance of identifying differences in awareness, brand perceptions and, hopefully, behavior if your brand's message can't be heard. You don't have to outspend your competitors for advertising but you do have to be able to break through with a minimal spending threshold or you will never be able to read differences in the key metrics from the pre-wave to the post-wave and/or from test markets to control markets.

Pulse vs. continuous tracking

Whether to pulse the reading or conduct a continuous read of the market will depend again on the media plan. If spending is relatively consistent after the initial launch of a new campaign, you will want to read the market on an ongoing basis, carrying out a minimum number of interviews daily.

There are many advantages to continuous tracking, including the flexibility to read the market before, during and after specific competitive events, PR disasters and/or market crises (e.g., a significant drop in the financial markets or a pandemic). Additionally, continuous tracking can save you from either totally missing out on a one-time event that might occur the week after you collected data, or from including it in your data, which may only have a minor longer-term impact on the market. It also allows you to aggregate the data into rolling periods (rolling four-week, 12-week periods) in order to smooth out the data, which increases the reliability and reduces the risk of obtaining biased results.

Conducting pulse waves is more applicable if your media plan has predictable spikes that render continuous tracking unsuitable. For example, if your plan is to spend heavily each time you launch a new advertising campaign with new executions, or even just a pool-out of an existing campaign for a short duration and then go dark, then there is little benefit to conducting continuous tracking. In this scenario, there will be minor impact on key metrics for the duration of the blackout period prior to new spending. Simply time each wave to be conducted shortly after each heavy spending period and then read the results.

However, there is no guarantee you will even see an impact, as the timing of the post-wave and the amount of spending can dictate the potential impact on the key metrics that include awareness, familiarity, consideration, usage and brand perceptions. Of course, this assumes your advertising is effective in that it drives awareness and motivates the target to want to purchase the product or service. (Pre-testing is critical before a launch.)

Suffice it to say that you need to spend enough on advertising to break through the clutter and for a sufficient period of time for your audience to notice. There is a ton of evidence to show that there is a lead-lag effect in advertising, so truncating your post-wave tracking can wind up with you totally missing the impact that you were hoping for. Again, timing is critical.

Longitudinal tracking studies

Longitudinal tracking collects data from the same respondents over time. This type of data can be very important in tracking trends and changes by asking the same people questions in multiple waves. It is particularly helpful if you are trying to determine if a targeted group of consumers is either adopting the attitudes and behaviors of the next age cohort they are moving into or if they are taking their attitudes and behaviors with them. Think about how the Gen Z segment might change as they move into the cohort currently inhabited by Millennials.

This is obviously time-consuming and expensive and is more commonly conducted and funded by large government programs but it does have its place in the system of tracking programs.

Longitudinal tracking can also be applied to programs where you are looking to assess if a particular group is adopting new learning or is influenced by messages that are meant to effect change. Think about campaigns that might be designed to positively influence how a group of physicians view new treatments for specific disease states. A pharmaceutical company could conduct a longitudinal assessment of the same group of physicians, one that may be limited in size. They may have been detailed over time and/or received specific articles or other marketing communication that were designed to inform and influence behavior. When the universe is small, it often helps to reach out to this same target group on multiple occasions for the sake of efficiency. When the universe is large, there is little reason to reuse samples as these may often lead to biased results.

And this brings up the important point about the potential dangers of conducting longitudinal tracking programs. It is quite possible that the act of conducting a longitudinal study, among the same sample, can serve to educate that specific population regarding the topic and can bias future waves. Respondents can take it upon themselves to further educate themselves and respond as others might, as opposed to reflecting their personal attitudes and behaviors.

Over time, participants may stop taking part in a longitudinal study. This is known as attrition. Attrition can result from a range of factors, some of which are unavoidable, while others can be reduced by careful study design or practice. Attrition results in a loss of sample size that in turn impacts sample reliability and the potential to extrapo-


NEWS

late results to a larger universe.

By definition, the value of longitudinal studies builds gradually. However, this means that researchers need to wait for more time to pass before they can answer some key research questions.

Additionally, some of the original questions could appear out of date while the environment and social landscape may have changed. Similarly, the design itself will be a function of what are considered best practices at the time of the initial setup of the program. As referenced earlier, tracking studies have evolved dramatically over the past 20+ years. What makes sense to implement now may seem out of date two years from now.

Digital tracking studies

Digital tracking is a technique that has only become prevalent within the past 10 years along with the advancement of digital advertising and digital tracking tools. Digital tracking can either be conducted in isolation or, more effectively, in concert with survey research tracking.

Access to survey data about what consumers think and their stated intent is essential for marketing, product development and more. However, while these insights are central to understanding consumers, there is a massive opportunity for observed data to complete the picture. It is much easier to understand consumers when you combine what they told you they would do with what they actually did. Advances in digital tracking now enable marketers to accurately gauge consumer behavior and couple those insights with needs and intent to bring the digital consumer profile into focus.

Digital tracking is crucial to understanding whether your target audience has been able to view your messages online and then to track their journey and path to purchase. What the audience is being exposed to (passively or intentionally) is instrumental in determining if your messages are properly targeting the right people. Digital tracking can shed light on the pre-purchase online searches that consumers conduct, establish what media they engage with, what sites they visit and whether they make a purchase. Ultimately, you would like to determine how you can positively affect behavior as consumers make their journeys on the path to purchase.

Work we carried out from 2010 to 2014 clearly indicated that consumers exposed to both digital ads and on-air advertising were much more likely to be influenced than those who were only exposed to one of them. It may seem obvious but we were able to actually identify the level of influence each type of ad had. We accomplished this by conducting simultaneous surveying and digital tracking among the same set of respondents. This is why it is important to consider both approaches when designing a program to track the market.

This can all be combined with social media listening programs to better understand how consumers are talking about your products/categories, determining the types of segments that exist and key search terms that will effectively reach your target. There are several tools to assist in collecting this data, some free, but most are paid-for services.

Next issue, we will continue our exploration, looking at key metrics, controlling variables, data analysis and the effective reporting of the resulting findings.

Elliot Savitzky is senior vice president at TRC Market Research. He can be reached at esavitzky@trcmarketresearch.com.

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Seeking a better outcome

How to improve the research process for today's health care practitioners

| By Greg Borden

snapshot

Greg Borden looks at some trends affecting medical marketing research and how to respond to them.

Today, there are more advances than ever in the therapies, medicines, equipment, technology and approaches that provide new hope for better patient outcomes. Understanding how health care professionals view these changes and uncovering their patient treatment needs are at the heart of medical marketing research.

In recent years, I've seen a number of trends that are changing the research industry itself. Understanding the impact of these trends will improve the survey experience of participants and clients alike.

More challenging

A primary reality of today's medical marketing research process is that curating and maintaining a high-quality pool of engaged experts has become more challenging.

Of the finite number of health care professionals in the world or a particular country, a relatively small percentage of them are willing and/or interested in participating in market research.

Also, the COVID-19 pandemic over the last two years has impacted health care professionals' availability. Critical-care pulmonologists, ER doctors and nurses have been slower to respond – for obvious reasons.

There are certain health care professionals (HCPs) who are more heavily called upon for research, oncologists being a prime example. While a primary care physician (PCP) may receive a handful of invitations for research, oncologists may frequently open their in-boxes to a dozen or more e-mails – and that's just from one panel provider. The truth is, it's quite common for HCPs interested in market research to sit on multiple panels.

The demand for cancer research, for very good reasons, is ever increasing. The trouble is that the supply of oncologists is beginning to decline, as the number of physicians going into this specialty is not keeping up with the number who are heading toward retirement. This fact, coupled with

the overwhelming number of research invitations at all times, causes this to be a never-ending frustration shared by both health care fieldwork suppliers and their clients.

The way our firm has solved this problem is rather simple: by getting along with our competitors. The vast majority of health care market research projects will require more than one panel. We embrace this idea and not only involve our trusted recruiting partners when scoping out a new study but we are transparent with our clients about which partners we plan on utilizing.

As a client, if you aren't told who the potential partners are, be sure to ask. That way, you'll be able to rule out those who are on your blacklist, request a favored partner you've had good experiences with or avoid involving a partner you're requesting a proposal from for the same survey.

Compensation has fallen behind

One of the biggest trends doesn't get talked about much these days, but it should be. In many instances, survey compensation for HCPs has fallen behind the true fair market value for their time. It's been a gradual process. Many multi-year studies haven't updated their budgets annually. When that happens several years in a row, you end up with the same incentive amounts for a study that started years ago. That also can skew the current market rate lower than the actual advance in health care professionals' prorated income.

The bottom line is that participants who were satisfied with $50 for a 10-minute survey two or three years ago, for example, no longer are. They might be more willing to participate for $60 or $70. That's not a very large price to pay for ensuring quality survey insights. However, the budget can become a deal-breaker for longer surveys, which may not be attractive to panelists if they don't reflect a higher rate.

To address this trend, take a look at the project budget. Is it the same as three years ago? If so, recalibrate the compensation levels based on the target health care professionals' current market value.

Yes, this can be a hard sell to the holders of the purse strings. But the benefits are numerous. Raising incentives encourages more high-quality panelists to participate. People will be engaged faster, which promises speedier data delivery. And, respondents will feel that their time is being more appreciated and valued and so they will be willing to participate in the future.

Don't be afraid to manage up and push back. Address the elephant in the room that things have changed. It's important to keep up with the times. Sure, finding a survey company to do the work for the current budget is possible, but how will that affect the outcome? Saving the equivalent of the bump up may not deliver the same quality recipients or the target number of responses.

Ignored, banned or blacklisted

Another trend is casting too wide a net for participants, when you actually want to attract people with very specific qualifications and qualities. Some companies will work from a huge target list, hammering away with constant streams of e-mails until they get ignored, banned or blacklisted.

That's where a well-vetted panel can help. It's a specific universe of participants that you already know a lot about. Then, a well-structured screening process can rule out participants early in the process rather than making them go through a long session only to be rejected.

For example, a screener can take a doctor through a short qualifying survey to see how many patients are being treated for certain conditions or with particular approaches and how far along in the treatment process they have gone. More in-depth online surveys can further refine the participants list.

That's a lot better than screening a broader group and only finding 15-25 percent who qualify and the others just feel frustrated. No one wants to waste a professional's time, particularly when they have bigger-picture responsibilities to their patients and their practices.

No longer realistic

There's also been a trend toward shorter time commitments. A 60-minute online survey is no longer a realistic expectation. While a small percentage of people may do them, it's unlikely that you'll engage enough to extract meaningful insights.

However, whittling the survey down to 15 or even just 20 minutes makes it easier to digest. Panelists can justify the time, maybe as part of their lunch break.

Remember that survey fatigue usually happens around the 15-to-20-minute mark. Anything longer than that and people start to be a little more robotic in their responses, particularly with open-ended questions. Instead, shorten the survey and put the open-ended questions earlier to encourage a more thoughtful response.

Breaking down surveys into multiple parts is also a good approach. That makes it easier for physicians to go through an online survey in shorter bits of time. If they do 15 minutes here and 15 minutes there, the overall time can really add up without a lot of stress.

This works well with anonymous patient chart audits. Many deeper insights can be gleaned, such as time between diagnosis and treatment, what treatment they have received and where the patient is on the treatment journey. And it may take the respondent only five or 10 minutes to fill out an online form.

Another even faster trend is to invite a small group of vetted physicians – say 20 to 30 – to log into a secure online portal to provide feedback to two or three questions a day over a three- or four-day period. Each participant is anonymous and the approach allows confidential replies. Or, answers can be seen by other panelists who can weigh in on the responses or their own experiences. This can give more nuanced feedback about different methodologies to be mined by the researchers.

Creating better experiences

These various trends offer opportunities for creating better – and even exemplary – survey experiences for panelists and clients alike.

Treat panelists well and you'll encourage repeat engagement and thoughtful feedback.

- Know your potential panelists and expertise; use smart screening to choose the best participants.
- Use cascading screening questions to whittle down the potentials quickly while respecting their time.
- Pay the current market value for their time if you can or keep the surveys shorter so they can move quickly through different research opportunities.
- Accommodate their busy schedules with shorter surveys as well as innovative approaches like bulletin boards and multi-section surveys.

There are ways to take the stress off clients as well:

- Be transparent when you recommend the use of partners to reach a target sample size from a small universe. Sharing the proposed partner's names can avoid awkward conflicts of interest or engagements with partners the clients didn't think were up to snuff in the past.
- Encourage compensation budgets that reflect the current market value of panelists.
- Consider shorter surveys to boost participation and keep compensation costs lower, if necessary.

The medical marketing research industry will certainly change again and again over time. Seeing the opportunities and pitfalls in the trends while innovating solutions will improve the survey experience all around and encourage valuable insights to help the health and well-being of people worldwide.

Greg Borden is vice president, business development for MedSurvey.

••• the business of research

More work to do

Where marketing research has been and where it needs to go

| By Alex Hunter

snapshot

Alex Hunter outlines five improvements we've made across 10 years and five we have to make sooner.

Market research has revolutionized how companies can get closer to their customers. However, changes such as the sustainability movement, the global pandemic and the big-health agenda affect the way we gather and deliver these crucial insights. As a result, common types of market research have been forced to evolve and improve.

So, what have we seen over the past 10 years?

Improvements

Sustainability. Across the last decade, we have collectively stopped printing vast reams of paper for our surveys. COVID-19 has finally put the last nail in that coffin, as we move not only to digital research methods but also flexible working, which has taken thousands of cars off the road and ensured that the paperless office must become a reality.

When I first started in research, I remember taking huge boxes of paper surveys out into the field on the train. We'd print them off, staple them and inevitably go back over each one with correction fluid to correct mistakes found last-minute. It was a scene many readers may recognize, thick with the smell of toner and the sound of the printer and staplers. The data team and researchers would argue over whether the tick was more in box four or five or why they'd routed to question 10 despite it being impossible to answer for a buyer of fish rather than cheese.

When I look back at it now I'm amazed we persevered, but of course, it was all we knew. The last vestiges of that world have been solidly swept away by the pandemic. Much of this is for the better, with more efficient tools and techniques replacing what had formerly felt comfortable. I still favor face-to-face research in all its forms, because there isn't much better than being able to really see the facial expressions of people, plus their physical responses, but the positives generally outweigh the negatives.

The positives are surely a massively reduced carbon footprint across the

whole industry despite the huge growth we have been through.

Efficiency. Hand in hand with sustainability probably goes efficiency and hand in hand with efficiency also comes speed. We can complete research far faster than ever before, using fewer resources and arriving at the answer at the speed of doing business. The challenge of this is that there is now an expectation of speed in everything.

With automation and artificial intelligence growing, it will be interesting to see how the industry changes and develops and what it might end up morphing into.

What we clearly need more of though is agility and the desire from all corners of the industry to answer quite specific questions at speed, which can be modular and build to help us answer bigger questions. However, this is going to take better partnerships between stakeholders and researchers to work collaboratively to solve problems.

Effectiveness. My first agency boss, when she wasn't kicking me under the table for my faux pas at client meetings, was drumming into me the fact that if it wasn't actionable insight then it shouldn't be on a page. I remember when she first caught this bug and, to a degree, it changed everything in the industry. It shifted the risk away from the person asking the question to the person answering it.

In the earliest days of market research, the research department was responsible for carrying out the work diligently and quite scientifically with the goal being the answering of the question. If the question was answered but the answer was of no use whatsoever, the job was still done. Now every project must arrive at an answer upon which some action can be taken. It's no longer useful to come up with answers that are already known, nor answers that don't challenge the status quo. For this, we are clearly infinitely better at driving change.

Human-centricity. Market research has moved up the food chain in importance in the eyes of business leaders. What was once an offshoot of advertising is now found across any touchpoint with the marketing or sales processes. We have become the glue that holds many different businesses' needs together and it shows.

Where it could go even further is in taking the learnings from our academic colleagues and starting to develop them into what it means to be human, why we do the things we do and what we can learn. We all know already that 40-minute surveys about latex gloves are not going to result in anything close to human insight, so why do we keep doing it?

Innovation. We're awesome at innovation, probably because we filter so many brilliant minds every day that small pieces of that brilliance keep chipping little bits off and adding bits on. Any research agency that doesn't have innovation at its core is probably not speaking to enough people in their day. Where we've really added something special though is the embracing of digital and really making it work. This has often come from outside the industry but increasingly I see some fantastic work from inside the industry. Some businesses which immediately come to mind are Zappi, Voxpopme and DisplayR, who I think we should be proud of as an industry, as they are really research-centric businesses with tech innovation at their heart that have gone out to solve a real problem and delivered on it. Where I take issue is bandwagon-jumping but perhaps that is something to save for another day.

What I think we need to keep doing is looking for those real issues with a true human connection that will come to define our industry. We need to be the glue between the real world of human experience and the needs of businesses in understanding it. Where technology and innovation can truly really help is removing administrative barriers, cost barriers and error or fraud.

What has to come sooner

Mental health. I'm convinced that the nature that draws many of us to research in the first place, and makes us excellent investigators, also leads many of us to suffer with our mental health. Not only this but the relentless nature of our work can exacerbate it.

My view is that our attachment to perfectionism is at the heart of our problems. Researchers find it difficult to let a project go before they can truly see it as perfect. I have always told them that perfection is unobtainable and if they forever seek it, they will forever be disappointed.

We do need to have the conversation about whether we, as an industry, need to do more to protect young researchers.

Diversity. We still don't have enough representation of minority groups across our industry, which is leading to a lack of understanding of viewpoints that are far from the center, especially in our qualitative research work. Where racial diversity is getting better with active voices promoting it, there are few people from working-class backgrounds, which results in systemic issues that are not being tackled.

I'd like to see agencies being much more comfortable recruiting from those who didn't go to university, since empathy, tenacity and curiosity alone would stand most researchers in perfectly good stead to start their careers in the industry.

Without this diversity, we risk missing the ability to truly connect with voices across the spectrum of our target markets and continue to unintentionally marginalize groups with our recommendations to businesses.

Specialism. There is a degree to which our drive at efficiency has lost some specialism along the way. The other day I overheard a quant-leading researcher explain to a junior that it was much easier for a "quantie" to understand qual than a "quallie" to understand quant. I couldn't disagree more. It's easy to be mediocre at everything but true specialists should be cherished and exalted.

We must support the ability for specialisms to grow, especially within fledgling in-house teams who are being pressured implicitly and explicitly to deliver everything from a small team.

Tools and resources are undoubtedly rounding off the edges of our lack of experience in some areas but assuming that everyone who can moderate a group can also write a questionnaire should be challenged by us all. The skills aren't all interchangeable.

Data, data, data. There is no business in any industry that isn't now swimming in data. The market research industry is continuing to add to this lake but not yet offering too many effective solutions to deal with the problem.

Insight aggregator tools are not being embedded in ways that internal teams would like and reports are often still getting filed away as a job well done and never revisited. So much investment is being tied up in projects which are then having limited capability to make real change.

Furthermore, it is equally important to consider data privacy to protect consumers as large amounts of data continue to become readily available in real-time.

Reductionism. In the fast-moving world of actionable insight, it is easy for us to reduce everything down to four slides, despite months of work and thousands of humans putting effort in. While research stakeholders will never thank us for losing a story in 146 slides of PowerPoint, they might also thank us for bringing the interesting, the inspiring and the engaging just for the sake of it.

Only the other day a client got excited by an offhand comment about a drinker in a pub and it sparked to life a whole conversation and hypothesis chain which might never have happened had we kept it to ourselves. There is no harm in delivering a bit extra if it adds to the story, even if it isn't deemed actionable.

Alex Hunter is commercial director at Spark. He can be reached at alex@sparkmr.com.

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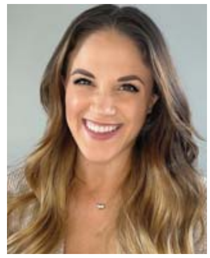

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Krämer Marktforschung GmbH

Founded 1986 | 51 employees
Markus Albrecht
Christoph Rogl, Managing Directors

Krämer Marktforschung GmbH, ISO 20252-certified, is one of the leading German data collection institutes in quantitative as well as in qualitative market research since 1986. With our nationwide interviewer field, we can manage all of your home use tests. No matter what product you want to test, even frozen products will be handled by our experienced project management team. Additionally, our professional in-house recruiting team will help you with target groups with low incidence to bring your home use test to success. Supported by our own studios all over Germany, we cover pilot testing and qualitative studies as well. Krämer – the most trusted partner in MR data collection.

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Founded 1984 | 250 employees
Brett Watkins, CEO

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Murray Hill National

Founded 2013 | 35 employees
Susan Owens, COO

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Founded 1959 | 25-49 employees
Scott Adleman, President

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Product Insights

Founded in 2002 | 6 Employees
Sandra Clear, President

Founded in 2002 by Proctor and Gamble alumnus Sandra Clear, Product Insights specializes in early-stage product development. Industry-leading experts in agile management of home-use testing, Product Insights engages an approach called Panelist Perspective™ that leads to completion and compliance rates averaging greater than 95%! What's more, clients feel that panelists are honest and engaged, leading to insightful and actionable learnings that are foundational for new product designs and communication. A research and development consultancy, specializing in market research – from study design, to execution, to data analytics and insights – for companies both large and small.

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www.productinsights.com/

Reckner Facilities

Founded 1991 | 225 employees
David Reckner, President

Celebrating over 30 years of market research excellence, Reckner provides the necessary expertise for your IHUT/HUT studies. Having managed IHUT/HUT projects for many years, we have developed streamlined processes and protocols for recruiting, placing product and completing quotas. Our highly tenured staff are proficient in all aspects of IHUT/HUTs and offer proactive solutions. IHUT/HUTs are challenging to execute correctly and have many moving pieces. Reckner has an intense commitment to overseeing and managing every detail of the process. We routinely manage large quotas, difficult recruits and complex product rotations, all with high quota completion ratios, quick turnarounds and competitive pricing.

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www.reckner.com/facilities

Schlesinger Group

Founded 1966 | 1,200 employees
Christy McCulla, Director, IHUT

Schlesinger Group is a leading data collection, research services and ResTech company, offering a broad range of quantitative and qualitative solutions to better help clients understand their audience and what motivates them. Our quantitative testing options include a range of online technology (mobile, online surveys and bulletin boards), while our qualitative approach covers in-home, in-person interviews or other online qualitative technology, such as video diaries and webcam interviews. Take advantage of Schlesinger's recruitment and product fulfillment services to round out your research project. Connect with us to discuss your research project: Connect@SchlesingerGroup.com.

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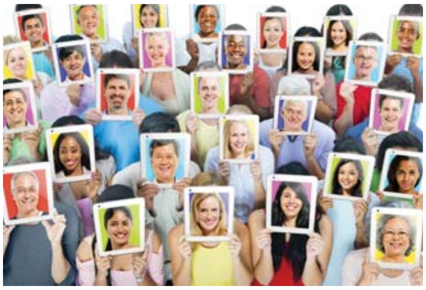
SchlesingerGroup.com

Symmetric, A Decision Analyst Company

Founded 2016 | 150+ employees
Jason Thomas, President of Symmetric



Symmetric operates American Consumer Opinion® (a worldwide panel of more than 7 million consumers) and five B2B worldwide online panels: Physicians Advisory Council®, Medical Advisory Board®, Executive Advisory Board®, Contractor Advisory Board® and Technology Advisory Board®. We have more than 30 years of experience conducting in-home usage tests. Our professional team is well-trained, dedicated and meticulous. Symmetric's product processing and shipping facility is 1,500 square feet and includes ample space for product storage. Facilities are temperature-controlled and cleaned daily. Employees who handle test products or work in the product-storage room are required to wear surgical gloves. Symmetric places a high value on representative samples, scientific sampling methods and advanced fraud-detection systems. Our online panels are carefully balanced, continually refreshed and systematically cleaned. Additional services offered include programming, hosting, online communities, tabulation, coding and IHUT mailing.

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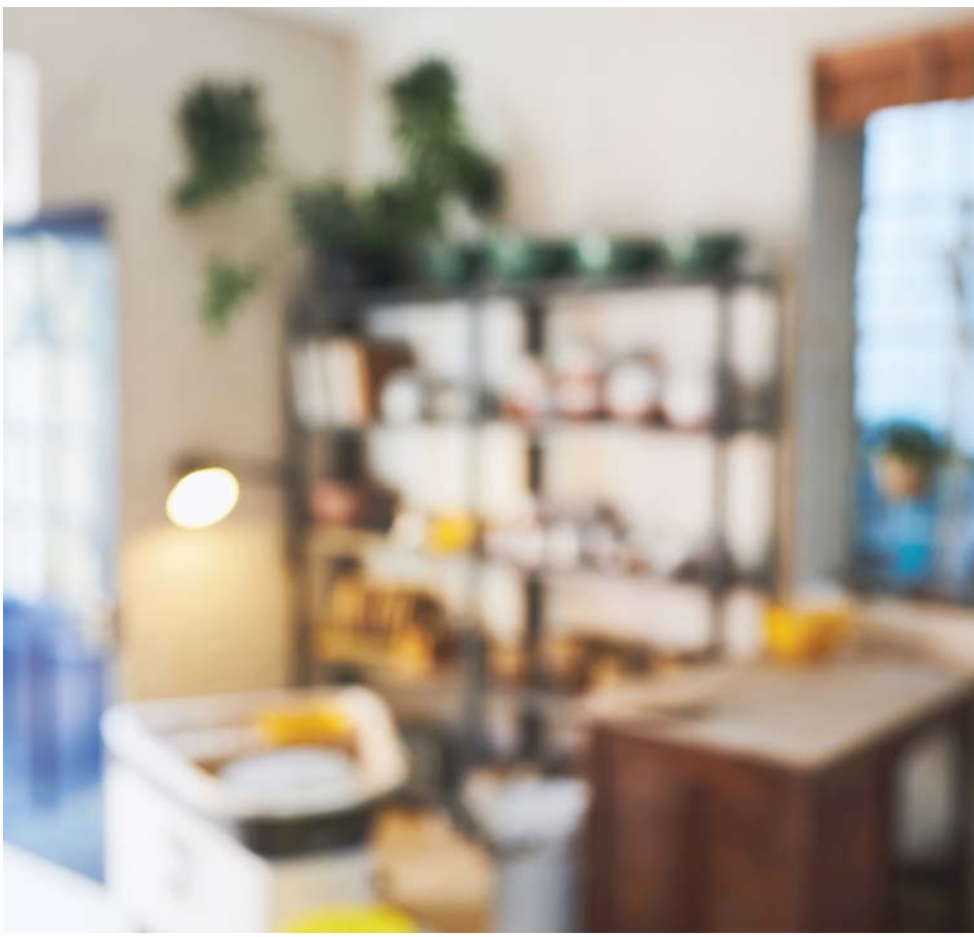


CALENDAR OF EVENTS

••• can't-miss activities

CX Forums will hold its CX Forums Boston Experience Summit on **May 10** both in-person and online. Visit https://cxforums.org/bos22/.

Merlien Institute will hold its CIEX Data Insights Summit 2022 on **May 10** as a virtual summit. Visit https://www.insightflow.io/event/ciex-data-insights-summit/.

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 Future of Pharma Marketing Summit 2022 on **May 18-19** in **Toronto**. Visit www.digitalpharmasummit.ca.

Quirk's Media will host Wisdom Wednesday on **May 18**. Visit www.quirks.com/events/wisdom-wednesday-webinars-may-18-20222022.

Informa will hold The Media Insights and Engagement Conference on **May 23-25** at the Grand Hyatt in **Nashville**. Visit informaconnect.com/media-insights.

The Insights Associaton will hold the X Event on **June 2-3** in Atlanta, GA. Visit https://www.insightsassociation.org/Events/Event-Info/sessionaltcd/2022XEVENT.

CX Forums will hold its CX Forums Chicago Experience Summit **June 7** both in-person and online. Visit https://cxforums.org/chi22/.

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 Wisdom Wednesday on **June 15**. Visit www.quirks.com/events/wisdom-wednesday-webinars-june-15-20222022.

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.

AURA will host its awards ceremony on **July 14** in **London**. Visit www.aura.org.uk/pages/the-auras.

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

Quirk's Media will host Wisdom Wednesday on **August 3**. Visit www.quirks.com/events/wisdom-wednesday-webinars-august-3-20222022.

The Insights Association will hold its IDEA Forum on **August 9-10** as a virtual event. Visit https://www.insightsassociation.org/Events/Event-Info/sessionaltcd/IDEAForum

ESOMAR will hold its Congress on **September 18-21** in **Toronto**. Visit esomar.org/initiatives/congress-2022.

Merlien Institute will hold MRMW Europe 2022 on **September 14-15 20-21** in **Berlin**. Visit eu.mrmw.net.

Quirk's Media will host Wisdom Wednesday on **September 21**. Visit www.quirks.com/events/wisdom-wednesday-webinars-september-21-20222022.

The 2022 Quirk's Event – Virtual will be held on **October 12-13** online. Visit https://www.thequirksevent.com/virtual-global-2022/.

Informa Connect will hold FEI on **October 19-21** at the Encore Boston Harbor in **Boston**. Visit informaconnect.com/feiusa.

Quirk's Media will host Wisdom Wednesday on **October 26**. Visit www.quirks.com/events/wisdom-wednesday-webinars-october-26-20222022.

The Insights Association will hold the Corporate Researchers Conference (CRC) on **October 26-28** at a location to be announced. Visit http://www.marketingresearch.org/conference/ia-corporate-researchers-conference-ia-crc.

Quirk's Media will host The Marketing Research and Insight Excellence Awards on **November 7** as a virtual awards ceremony. Visit www.quirksawards.com.

Informa Connect will hold The Market Research Event (TMRE) 2022 on **November 14-16** in **San Antonio**. Visit informaconnect.com/tmre.

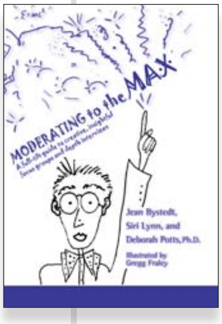
Quirk's Media will host Wisdom Wednesday on **November 16**. Visit www.quirks.com/events/wisdom-wednesday-webinars-november-16-20222022.

Insights Association will hold CONVERGE on **December 6-7** at a location to be announced. Visit https://www.insightsassociation.org/Events/Event-Info/sessionaltcd/2022Converge.

Event details as of March 21, 2022. Please see websites for more details.

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

ESSENTIAL READING FOR RESEARCH PROFESSIONALS



Moderating to the Max

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

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

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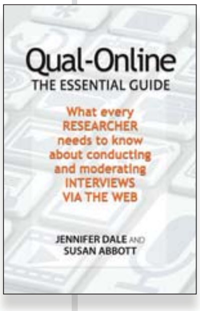
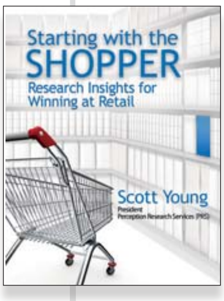


Qual-Online: The Essential Guide

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

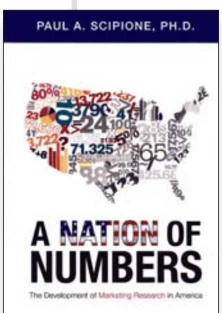


Starting with the Shopper

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



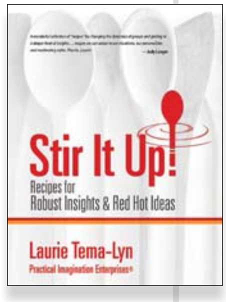
A Nation of Numbers

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!

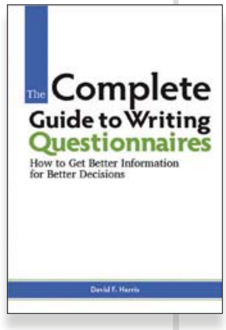


Recipes for Robust Insights & Red Hot Ideas

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

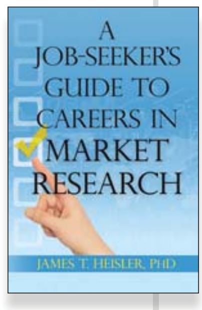


How to Get Better Information for Better Decisions

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.

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10 minutes with...

Nadia Morozova
Head of EU Research and Insights, Marketing Science
TikTok

"I'm a true believer in the power of mixed methods research."

What led you to a career in market research?

I'm passionate about insights! Because of this my career has been focused on research, data analytics and insights.

My journey as a researcher started in middle school, when I realized that I would like to specialize in the field of economics. While a very early age, I really loved all aspects of research. At university I was the first to sign up to any possible research project, and all my professors were confident that I would pursue an academic career. And so was I! But while I was finalizing my bachelor dissertation, I realized that I couldn't provide a lot of details on the "So what?" question.

Since then, I've been through many stages in my industry research career and in my academic journey, but the passion has stayed the same: combining academic research and marketers' challenges to ensure that best-in-class research methodologies are applied when identifying business opportunities and addressing them in a consumer-centric way.

What is the biggest challenge you've faced when creating the EU research and insights department in marketing science at TikTok?

Building a team remotely across the whole of Europe has been a challenging journey, and I feel extremely humbled to have had this opportunity. The focus I had when I started the journey was to build a diverse, collaborative and high-performing team from day one. Some of the key values for my team are to support our business to be data-driven, provide best-in-class research and data analytics and, of course, continue learning and celebrating our success. A lot has been accomplished on this journey, and there is much more to come!

As a company with users across the globe, what research methodologies do you find most useful for authentically representing consumer voices?

I'm a true believer in the power of mixed methods research. By mixed methods, I mean a blend of various research methodologies and methods, starting from traditional qualitative and quantitative research and following with more agile methods, social intelligence and ending up with consumer neuroscience.

As my team consists of both researchers and data analysts, I also appreciate the quality of analytical output which comes when we blend high-quality research with rigorous expertise in data analytics.