QUIRK'S

For marketing research and insights profe

DON'T LEAVE CUSTOMERS OUT

WHY THEIR FEEDBACK STILL MATTERS IN CX RESEARCH

Also Inside

THE Q REPORT 2022

PLUS

Is the quality function a new customer for MR?

Brand strategies for talking about climate change

Be the keeper of your CX stories

FOCUS ON THE RESEARCH.
#facetofacemrx
fieldwork
Global Field Management
Local Recruiting
Online Research
WE'LL DO THE REST.

ADVERTISING SECTIONS

8 Top Food/Nutrition Research Companies

7 Top Attitude and Usage Research Companies

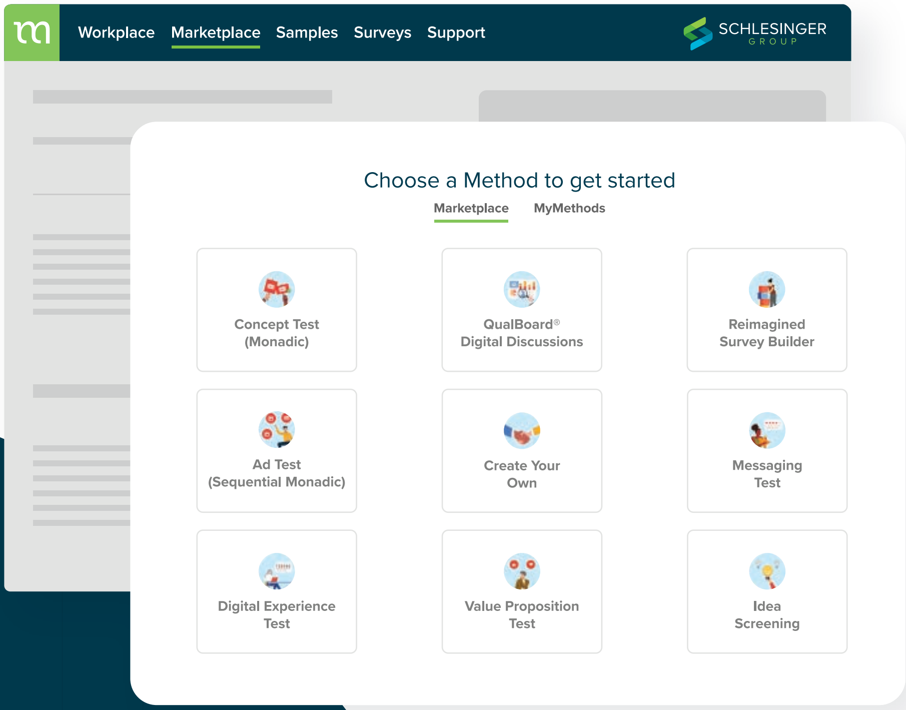
Quirk's Marketing Research Review
September/October 2022
Volume XXXVI Number 5
www.quirks.com

SCHLESINGER
GROUP

SELF-SERVE RESEARCH
powered by Methodify

CX & UX Solutions

- **Reimagined Survey Builder** Program your own surveys.
- **Trackers** Compare results and monitor trends for ongoing insights.
- **Digital Experience Test** Learn how your target audience feels.
- **Create Your Own** Build your own research tool to collect exact insights.


Workplace
Marketplace
Samples
Surveys
Support
SCHLESINGER GROUP

Choose a Method to get started

Marketplace
MyMethods
Concept Test (Monadic)
QualBoard® Digital Discussions
Reimagined Survey Builder
Ad Test (Sequential Monadic)
Create Your Own
Messaging Test
Digital Experience Test
Value Proposition Test
Idea Screening

Achieve more of your insights goals with self-serve research.

Get started:
methodify.it/self-serve-platform

SCHLESINGER
GROUP

DIGITAL
QUALITATIVE

Proprietary research platform, recruitment, and world-class project management

Drive understanding and bolder decisions with our suite of flexible, digital qualitative solutions.

Online Discussions

Online Communities

Mobile Ethnographies

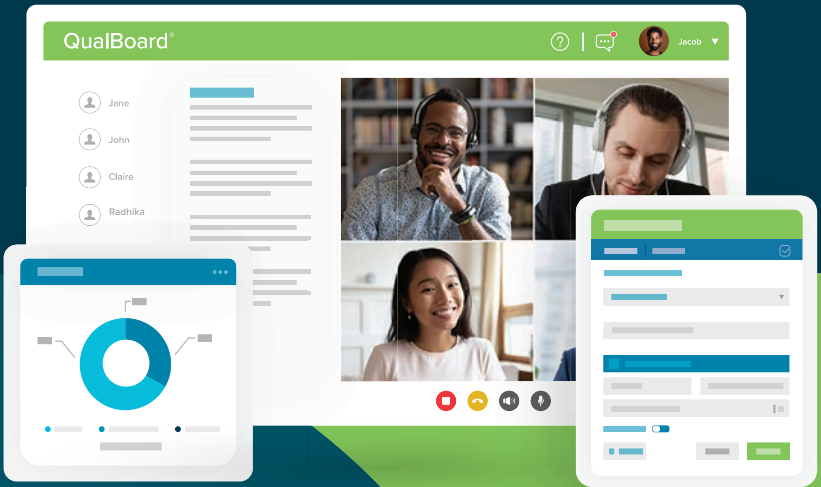
Hybrid Quant + Qual

Global Solutions

Web-enabled IDIs & Focus Groups

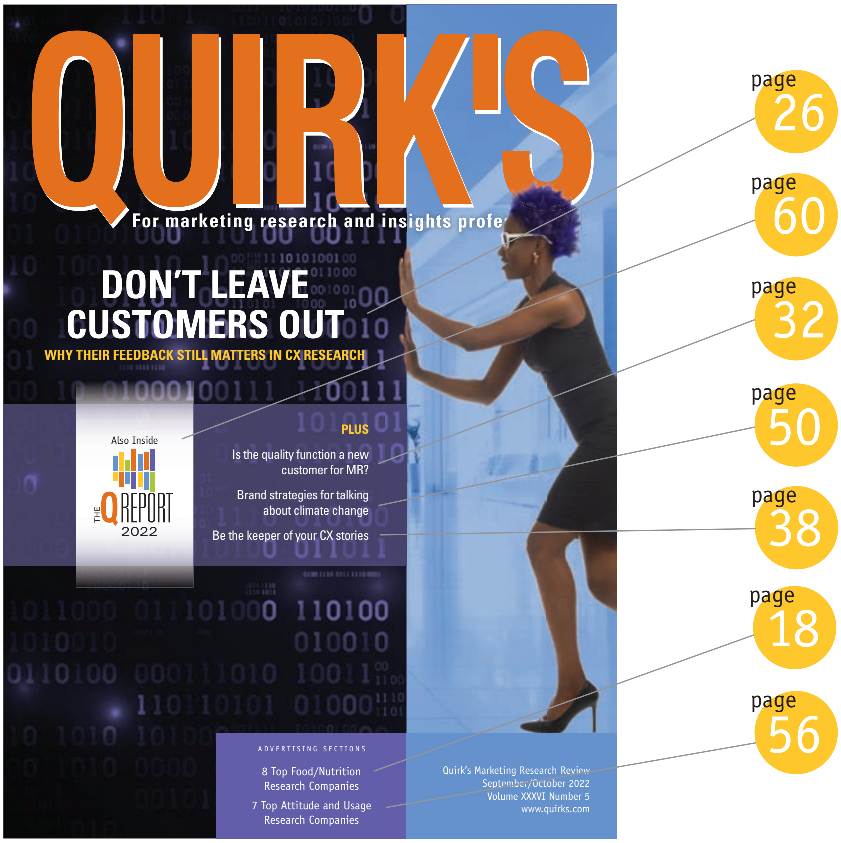
We are your global research partner, anywhere, anytime.

Connect with us:
SchlesingerGroup.com



CONTENTS

Quirk's Marketing Research Review
September/October 2022 • Vol. XXXVI No. 5


QUIRK'S
For marketing research and insights profe
DON'T LEAVE CUSTOMERS OUT
WHY THEIR FEEDBACK STILL MATTERS IN CX RESEARCH
Also Inside
THE Q REPORT 2022
PLUS
Is the quality function a new customer for MR?
Brand strategies for talking about climate change
Be the keeper of your CX stories
ADVERTISING SECTIONS
8 Top Food/Nutrition Research Companies
7 Top Attitude and Usage Research Companies
Quirk's Marketing Research Review September/October 2022 Volume XXXVI Number 5 www.quirks.com
page 26
page 60
page 32
page 50
page 38
page 18
page 56

DEPARTMENTS

6 Click With Quirk's
8 In Case You Missed It...
14 Survey Monitor
18 8 Top Food/Nutrition Research Companies
56 7 Top Attitude and Usage Research Companies
60 The Q Report 2022
78 Calendar of Events
81 Index of Advertisers
82 Before You Go...

ON THE COVER

26 Don't leave them out
Why feedback from customers still matters in CX research
By Mike Deinlein and Toby Zhang

FEATURES

32 A new customer for customer insights
How marketing research can benefit – and benefit from – the quality function
By John Goodman

38 Preserving institutional memory
The value of insights storykeeping in the turnover era
By Nick Freiling

42 Beat the clock
Using video technology to keep up with the rapid pace of change
By Lincoln Merrihew

46 Keeping up with the Zoomers
How brands can capture the interest of Generation Z
By Joeri Van den Bergh

50 Creating agents of change
How companies and organizations can overcome 'infowhelm' and motivate action for the planet
By Rachel Dreyfus and Anna Price

COLUMNS

10 Trade Talk
Tech-enabled customer service still getting off the ground
By Joseph Rydholm

22 By The Numbers
Get your metric right
By Greg Ryan

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

Publisher • Steve Quirk
steve@quirks.com | x202

Editor • Joseph Rydholm
joe@quirks.com | x204

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

Assistant News and Content Editor • Marlen Ramirez
marlen@quirks.com | x212

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

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

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

Sales • Tammy Job
tammy@quirks.com | x211

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

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

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

An interactive downloadable PDF of this magazine is available at www.quirks.com/pdf/202209_quirks.pdf.

Follow us on Twitter @QuirksMR.

WebMD Medscape Market Research Services

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

WHY US?

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

WebMD®
Medscape®
WebMD Professional

Market
Research

Need a quote?
Click here or contact us at www.medscapemarketresearch.com

CLICK WITH QUIRK'S ••• online, e-newsletter and blog highlights

Connect with Quirk's Events from home

We know that many attendees enjoy our in-person events. We do too! However, sometimes it's hard to get away from home. That's why our next event gives you all you love about the Quirk's Events without the need to travel. Attend the Virtual Global event Oct. 11-13 from the comfort of your home or office.

Learn more and register: https://bit.ly/3A3iYhy

Let's celebrate!

The Marketing Research and Insight Excellence Award finalists were announced on September 7. Thank you to everyone who entered! We are excited for the Virtual Awards Celebration on November 7. To register, head to https://bit.ly/3QbwV2l. We are so excited to see who the winners are this year! We hope you will join us!

The Marketing Research and Insight
EXCELLENCE
AWARDS
powered by QUIRK'S

QUIRK'S
Marketing Research Review
CLICK HERE
SSI

// E-newsworthy

Better quality research without sacrificing speed

https://bit.ly/3P4aNWp

Three tips for proving the ROI on your insights function

https://bit.ly/3JBr5Vy

16 ways artificial intelligence and machine learning are evolving the marketing research industry

https://bit.ly/3bFItMw

// Noted Posts

Quirk's Blog

The future of market research from Quirk's New York 2022
https://bit.ly/3BT8sdZ

Attending the largest Quirk's Event
https://bit.ly/3BNmhdW

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

Research Industry Voices

How to manage your marketing budget
https://bit.ly/3dgcov9

The importance of conducting marketing research in 2022
https://bit.ly/3A5pIeF

Taking steps toward marketing optimization
https://bit.ly/3JGzHdS

Tech, sustainability and diversity: Quirk's Event New York takeaways
https://bit.ly/3A7I8f3

Research Careers Blog

How generations are perceived at work
https://bit.ly/3Qfd2I4

Why market researchers must develop an always-on research approach
https://bit.ly/3P7k4Nw

AI Coder

The next generation Ascribe AI solution

coder

Creates a theme-based codebook instantly, enabling a question to be coded and delivered in less than an hour.

95% coding accuracy in 30% of the time, with 70% labor savings
in a Product Concept Study versus manual coding with Coder.

Control the work and level of automation

Easily edit codebook and create nets

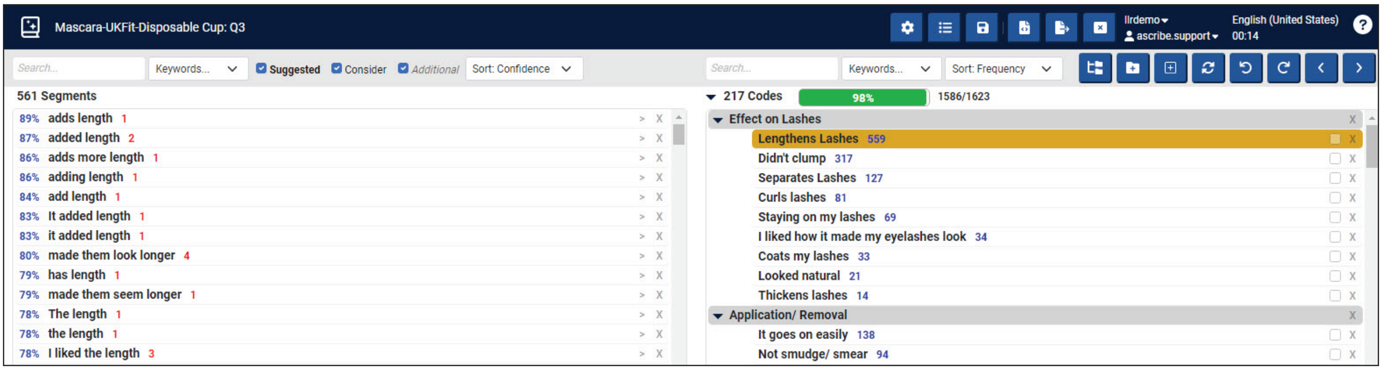
Find the code connected to the segment

Benefit from the most advanced NLP technologies

Identify the top codes with one click

Process large datasets quickly

Reduce coding time, lower costs and improve productivity, all with incredible results.



Mascara-UKFit-Disposable Cup: Q3

561 Segments

89% adds length 1
87% added length 2
86% adds more length 1
86% adding length 1
84% add length 1
83% It added length 1
83% it added length 1
80% made them look longer 4
79% has length 1
79% made them seem longer 1
78% The length 1
78% the length 1
78% I liked the length 3

217 Codes 98% 1586/1623

Effect on Lashes
- Lengthens Lashes 559
- Didn't clump 317
- Separates Lashes 127
- Curls lashes 81
- Staying on my lashes 69
- I liked how it made my eyelashes look 34
- Coats my lashes 33
- Looked natural 21
- Thickens lashes 14

Application/ Removal
- It goes on easily 138
- Not smudge/ smear 94

> *"I am really excited about AI Coder. The new version is a significant step forward. It is very smart and sophisticated. I love that it not only can pick out segments to build codes but it also can build nets as well. It is going to be very helpful when we have large studies."*
>
> Sandi, Partner, **Coding Experts**

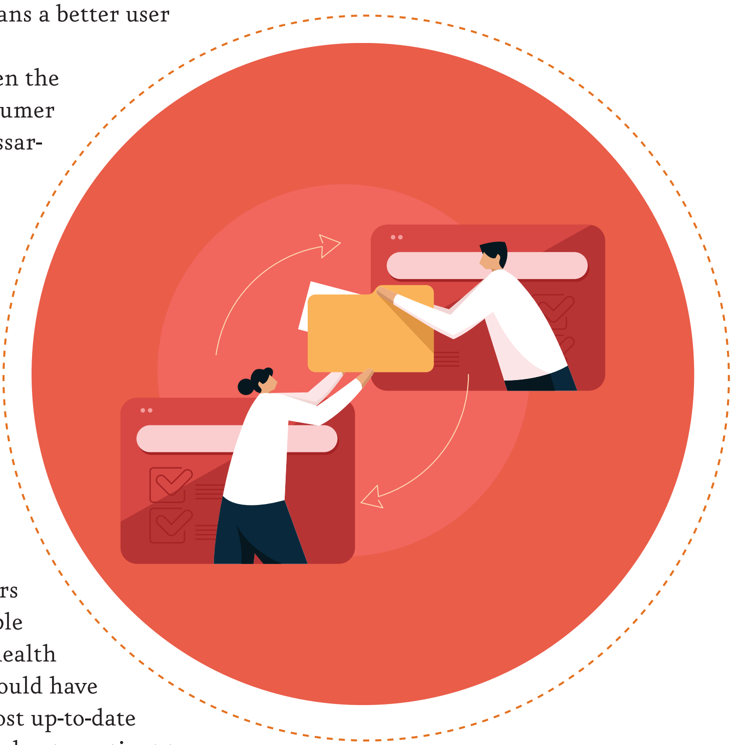
ascribe
words to wisdom

Learn more about the power of Coder at GoAscribe.com or call 877.241.9112 x55.

••• data privacy

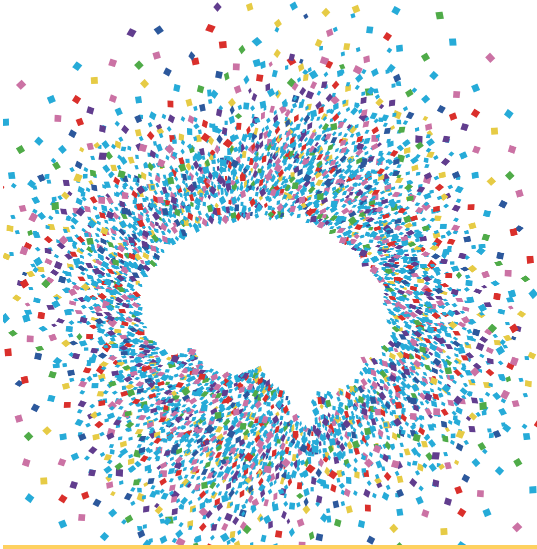
Global views on sharing data differ

A global survey by application programming interface management firm Axway found regional – and perhaps cultural – differences in consumers' embrace of data openness: 75% of Brazilians and 59% of Americans said it is worth giving companies access to their personal data if it means a better user experience, whereas the British are actually quite split – only 50% agreeing it's worth giving access to their data – and Germans are slightly opposed to the notion, with only 48% agreeing. Overall, almost 60% of those surveyed are fine with sharing their personal data if it means a better user experience.



Even when the average consumer doesn't necessarily grasp the technology underpinning it, principles of data openness seem to resonate with respondents. For example, three-quarters (76%) of people agree their health providers should have the same, most up-to-date information about a patient to help decrease miscommunication and human errors and provide better care. Meanwhile, 84% of respondents globally agree that they should have control of their financial data and banks should not prevent the movement of money between other financial services – principles that are basic tenets of open banking.

Brazilians are most wholeheartedly embracing open banking, with 79% of them saying they have a positive view a movement toward it. U.S. consumers are more split, with only slightly more feeling it's a positive development (51%) and the rest worried about security and data privacy.



••• restaurant research

Color captures diners' attention

An appealing photo of a menu item can help a restaurant increase sales – especially if the right filter is used, a new study suggests. Photos high in color saturation make food look fresher and tastier, increasing customer willingness to order the menu items, researchers found. How well color saturation works can even depend on whether consumers plan to dine alone or with others.

The study, "Marketing online food images via color saturation: A sensory imagery perspective," was published in the Journal of Business Research. In one test of respondents browsing Instagram for a pizza restaurant, the food in the color-saturated photo was always seen as fresher and tastier and something people would be more likely to buy. But that effect was stronger for people who were told they would be eating alone and weaker for those who would be eating with family.

"When people are eating with others, the social experience is a big part of what people look forward to," says Stephanie Liu, lead author of the study and associate professor of hospitality management at The Ohio State University. "But when they anticipate eating alone, they focus more on the food itself. They want the food to be fresher and tastier and that's why color saturation is more important in this context."

Build Cultural Fluency with Cultural Intelligence Trusted by 250+ Brands

Connect Effectively and Efficiently Across Consumer Segments

Consumer Research Programs
Multicultural | Generations
LGBTQ+ & Gender | Parents & Kids

Diverse Consumer Insights on High Growth Consumer Segments
Hispanic | Black | Asian | Gen Z | Millennial
Women | LGBTQ+ | Parents | Kids

COLLAGE GROUP®

Cultural Intelligence Platform

10+ years of
consumer insights
with new data weekly

CultureRate: Brand & Ad

Assess the
Cultural Fluency of
your brands and ads

Custom Market Research

Tailored solutions
by our in-cultural
qual and quant teams

Unleash the Power of Culture to Drive Brand Growth
CollageGroup.com/contact

By Joseph Rydholm, Quirk's Editor

Tech-enabled customer service still getting off the ground

©Clare Pix Photography www.clarepix.com

Joe Rydholm can be reached at joe@quirks.com

While each of you no doubt has several anecdotes to the contrary, I feel like customer service has gotten, dare I say it, better in recent years. I'm not referring to in-store customer service – that's as hit-or-miss as ever. Rather, I'm talking about the digital realm, the web- or app-based encounters.

There are many factors at play but it seems like companies are finally finding ways to use technology to help their CSRs deliver a better experience when customers reach out to resolve a problem or answer a question.

Early on, I was afraid that tech applications would evolve no further than the godawful bot-based customer service tools that many consumer-facing sites have, with their cutesy avatars promising to enthusiastically help you with every possible problem when in reality they're about as useful as the product troubleshooting FAQs that urge you to "make sure the unit is plugged in."

My hunch was that CSRs now have access to more information and therefore, crucially, have more ability to answer questions and fix those thorny problems that the bot reps cheerfully fail to understand when you type in your query.

According to results from a study released early this year, I was right about the more information part. For its CRM of the Future Survey 2021, software and services company Amdocs commissioned Coleman Parkes Research to survey 3,000 consumers, 100 CRM decision makers in Tier 1 communication companies and 150 of their customer agents to better understand how agents and the technology and systems they use interact.

Here's the report's take on the role of technology. Maybe things have already gone too far:

With as many as six systems in place to complete customer processes and an average of three required for every single request, digital adoption is far from seamless for contact center and retail agents. Too many systems – which are often slow and lack integration – are taking up agent time, forcing them to invest energy and time into manual processes rather than concentrate on the customer at hand.

The decision makers know their systems are not all they could be. Only 38% of those surveyed give high marks to the automation in their customer service support systems for how they trigger processes, suggest the next best action, capture customer details and send proactive notifications. Which means that the unfortunate service agents on the other end of the phone line or computer connection have a lot to deal with, on top of crabby customers.

And the trouble is, brands want to rely on technology even more in the future: Currently just over half (51%) of customer interactions are automated/unassisted across multiple channels (e.g., virtual assistants, chatbots, telephone automation, mobile apps or online portals) but decision makers want that to rise to three-quarters (76%) in coming years.

My recent customer service win occurred in early May when I used the messaging function in the Delta Air Lines app. Hours after landing in London for our Quirk's Event, I tested positive for COVID-19 and over the next two days I frantically tried to figure out how to fly back to the U.S. once I was no longer considered a threat to my fellow passengers.

The wait times to speak to a Delta agent by phone were routinely more than two hours and I recalled that Delta now offers customer service through its app but feared that would just be more generic bot nonsense. Thus I was floored when my messaging connected me instantly to a real person, who efficiently helped me figure out my next steps. That our interaction was text-based rather than voice-based didn't matter.

I ended up being able to fly home only a day later than originally planned, though of course I was disappointed to have to stay away from our event a few floors below me in the hotel.

I realize the preposterousness of citing an airline as an example of technological and operational efficiency but whatever Delta has figured out, I hope it takes off.

consumer panel
quantitative research
analysis
insights
integrated research
data

Expectations exceeded.

The Most
Seamless
IHUT
Platform
In Research

Jay Mace
Senior Vice President
Mindfield

"This solution has been ground breaking for clients who struggled with successful and profitable in-home product research."

800.969.9235

Mindfield

mindfieldtech.com

jmace@mindfieldtech.com

"I like that my opinion matters on the products I see and install. I feel that if a manufacturer hires a company like myCLEARopinion, they are serious about the contractor's point of view. I believe that what we do here helps everyone, from the manufacturer to the end user."

—HVAC Contractor

Trust

IN RESEARCH

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

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

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

BUSINESS-TO-BUSINESS & CONSUMER INDUSTRY EXPERTISE

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

Clear Seas
RESEARCH
Making the complex clear

www.clearseasresearch.com

IN FOCUS

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

Q // Survey Monitor

••• automotive research

Easy on the EVs

Despite high gas prices, drivers not sold on electric vehicles

It may take more than skyrocketing gas prices to get consumers to make the switch to an electric vehicle, according to a study of U.S. automobile owners conducted by automotive research and shopping website CarGurus. While electric vehicles may seem easier to manage, 39% of those surveyed believe a gas-powered vehicle is more convenient, followed by a hybrid without a plug (26%) and a hybrid with a plug (18%).

And though drivers have continued to show interest in purchasing electric vehicles, some are hesitant to make the leap, choosing instead to lower their fuel consumption (59%), cut their spending in other areas (44%) and consider alternative fuel-efficient vehicles (30%).

When considering electric vehicle brands, Tesla continues as the crowd favorite (45%), followed by Toyota (44%), Honda (40%), Ford (31%) and BMW (24%). Electric vehicle owners consider themselves early adopters of technology (56%) and would label themselves as environmentalists (35%).

Comparing this study to the previous one from 2021, the percentage of drivers who indicated they would make the switch to an electric vehicle if gas reached $5/gallon has dropped. In 2021, 56% indicated they were more likely to purchase a vehicle if gas hit $5/gallon. This year, as the possibility becomes more realistic, only 27% are likely to make the purchase and instead would be 70% more likely to if gas reached $8/gallon. Thirty-nine percent of drivers agree that electric vehicles are worth the cost and 67% agree that they are the future, but many are not yet sold. “Electric car batteries don’t last long enough to pay the price,” says one driver.

CarGurus conducted its survey with 2,176 U.S. automobile owners to better understand the general sentiment towards alternative-fuel automobiles. The first portion of results were obtained on February 28, 2022, before gas prices hit their peak. The second portion was conducted on March 14, 2022, and the third on April 8, 2022, while prices were steadily increasing.

••• education research

College is a group effort

What makes a college completer vs. non-completer?

Family support and family college history are two big factors that influence the success of degree-seekers, according to a study conducted by Sallie Mae and Ipsos. The study, which focused on completers (students who finished a two- or four-year degree) and non-completers (students who did not finish a two- or four-year degree), found that out of those who received a degree, 69% had parents who completed college while 51% of the non-completers’ parents had finished their programs. Further, 92% of non-completers say they were encouraged to pursue higher education but were less likely to feel supported throughout their college experiences.

When reflecting on their educational pasts, 74% of completers indicated that they had decided to attend college before reaching high school while 55% of non-completers decided after beginning high school. Sixty percent of completers "always knew" college was in their future while only 31% of non-completers were sure of their college careers.

Non-completer students left their colleges at varying times. Thirty-one percent were likely to leave during their first year, 38% during their second and 31% during or after their third year. Eighty-two percent, however, are open to returning to courses once they are more prepared.

Both groups attended college to meet family expectations and to receive better future opportunities. Other common reasons included to earn more money, expand personal knowledge, experience independence and to get a good job. Most students chose their respective schools based on the scholarships or aid they received, the school's affordability and the close-to-home location.

Most non-completers withdrew from their programs due to a shift in focus, motivation or a life change (40%), financial reasons (19%) and mental health (14%). Fifty-two percent of non-completers and 41% of completers found it challenging to balance the college workload with mental health. Ultimately, those who finished their programs felt less stressed and more confident and satisfied in their careers.

Seventy-five percent of completers and 53% of non-completers say they are satisfied with their life. Regardless of the differences between completers and non-completers, both groups agree that college is not for everyone. Ninety percent of completers and 84% of non-completers think that traditional college is not required to succeed.

This survey was conducted by Sallie Mae and Ipsos with 561 American completers, aged 18-30 who completed a two- or four-year degree program, and 529 American non-completers, aged 18-30 who did not finish a two- or four-year degree program. The research was conducted between February 2-22, 2022.

••• generations research

Moderation is key

Millennials, Gen Z are normalizing lower alcohol consumption

Instead of reaching for a glass of wine to relieve stress, Millennials and Gen Z say they're just as likely to pick up a book, according to a new study on conscientious drinking by Reach3 Insights. While both generations indicated participation in a variety of other activities to help manage their respective stress levels including reading and writing, exercising, listening to music and mindfulness, the study found that Millennials are more likely to drink alcohol (74%) than Gen Z (66%).

The younger generations are becoming more intentional about when and where they decide to drink. For example, both generations are questioning the time-honored practice of meeting friends for drinks. The trend of dry dating (going on alcohol-free dates) has gained popularity among both Gen Z and Millennials. Twenty-eight percent of Gen Z have tried dry dating along with 21% of Millennials. Twenty-five percent of Millennials indicated an interest in trying dry dating while 37% of Gen Z indicated they would be willing to participate. (The two cohorts agree the term "dry dating" is pretentious and overly trendy.)

Both generations agree that dry dating can offer benefits during romantic encounters compared to dating when alcohol is involved. Among women, safety was a key factor, especially while on a first date. Other advantages included a more authentic experience, avoiding the negatives of alcohol and feeling comfortable with the person you are seeing.

"We found that overall, these groups believe moderation is key and do not seek alcohol to become the most 'fun' version of themselves, especially when dating," says Jonathan Dore, senior vice president and founding partner of Reach3 Insights. "Drinking isn't inherently bad, but the younger consumers believe moderation is key – as in they can still drink and have an honest and authentic interaction if both parties are responsible for themselves and their consumption."

Fourteen percent of consumers indicated a preference for a lower level of alcohol content in their beverages or a drink that also offers health benefits. Sixty percent indicated an interest in seeking companies that offer lower-alcohol beverages or health benefits. Some respondents indicated that they enjoy flavorful beverages without the high amount of alcohol.

The study was conducted by Reach3 Insights among 1,016 U.S. adults aged 21-39 from April 8-14, 2022.

••• financial services

Current worries cloud future picture

Inflation weighs on younger generations' retirement plans

Inflation is impacting everyone's present financial situation but for Millennials and Gen Xers, it's also affecting their plans for the future, according to findings from a survey conducted by Voya Financial Inc. While 55% of Baby Boomers and 62% of those in Genera-

••• entertainment research

Back to the future?

Overwhelmed by streaming options, some pine for a return to bundled content

Sky-high bills and bloated channel lineups led many cable subscribers to cut the cord and turn to a la carte streaming services. But as the streamers proliferate, could the dreaded bundle make a comeback? Nielsen's State of Play report found that although many people are subscribed to various streaming services, 64% of subscribers would be interested in subscribing to a single company that allowed them to choose which video streaming platforms they receive.

Convenience is a driving factor towards the preference for a bundle option from a single provider. Many U.S. households have cable or satellite in addition to their streaming platforms but 44% have "cut the cord" completely.

Despite the interest in simplifying streaming options, FOMO has led consumers to add more services to watch a show or movie others are streaming. Thirty-six percent say they would subscribe to a new streaming service if they were not already receiving the content it offers. Twelve percent admit they would rather cancel a non-video subscription in exchange for an additional video service, cancelling, for example, a Spotify or Apple Music subscription in exchange for Netflix or Disney+.

Access to original content that is exclusive to a specific streaming platform (42%) is the most common subscription reason. Forty-one percent subscribe to watch shows others are talking about. Forty percent want to expand the amount of content available to them and 37% want to watch shows they previously watched on TV that can't be found elsewhere.

In 2022, most consumers subscribe to more than one service, with the highest percentages being two (24%) and three (23%) streaming subscriptions. Cost is the most important factor when considering a new service. Consumers also prefer an easy-to-use service (79%), a platform with a variety of content (79%), good-quality streaming (76%), availability throughout a variety of devices (60%), ad-skipping features (59%), ad-free content (55%) and live content (48%).

Fifteen percent of respondents spend $50 or more on monthly streaming services and 17% spend between $30-$49.99 a month. Ninety-three percent of respondents plan to make use of their subscriptions by increasing their streaming usage in the next year.

This data was obtained though The Nielsen Streaming Media Consumer Survey. The survey was conducted on 1,394 U.S. adults from December 14, 2021, to January 6, 2022.

tion Z agree or strongly agree that they are worried about the impact of inflation on their ability to save for retirement, those numbers shot up to 73% for Millennials and 74% of Gen Xers.

Overall, 66% of Americans surveyed agree or strongly agree that they are worried about the impact of inflation on their ability to save enough for retirement. What's more, an even greater amount of individuals agree or strongly agree they are worried about the impact of inflation on their personal finances and the ability to maintain their current lifestyle (71%). The survey also found a majority (84%) of Americans feel like their money does not go as far as it used to go, leaving many to wonder how saving for the future will be able to remain a priority.

More than half (57%) of Millennials, who now make up roughly one-third of the U.S. labor force, agree or strongly agree that, because of inflation, they will need to delay their planned retirement date.

The concerns of Millennials today may be rooted in their experience living through the Great Recession and then the recent economic downturn tied to the pandemic. Add to these concerns the burdens of student loan debt, higher health care costs or the rising cost of childcare and education, and the uncertainties deepen.

Often coined a generation likely to spend their hard-earned money on travel or entertainment, Millennials stood out in Voya's research as having the most concerns about the long-term financial impact of both COVID-19 and inflation. The survey also revealed that 68% of Millennials agreed or strongly agreed that, because of inflation, they are not able to pay down debt as quickly as they want to — and even more (77%) agree or strongly agree that inflation has made them more aware of the need to save more for emergencies or unexpected events.

"Voya's survey also found that, because of inflation, nearly half (43%) of individuals have had to tap into finances that they previously had set aside for retirement — and not surprisingly, this is even higher among Millennials (57%)," says Heather Lavallee, CEO of wealth solutions for Voya Financial. "While a focus will always remain on driving greater outcomes for retirement, the realities of our world today require a shift in thinking about the opportunities to harmonize one's entire savings picture. Resources such as health savings accounts to offset the burden of medical costs, student loan debt support and tools for building emergency savings continue to grow in popularity as employer wellness benefits. Going forward, it will be critical for employers to provide support in these areas so these generations, and all individuals, can find greater opportunity to build a secure financial future," says Lavallee.

curion
Consumer Insights. Delivered.
Ravel

One Partner

Introducing Ravel, Curion's new insights division. The only product insights company delivering from early innovation to product testing through launch, allowing for seamless knowledge transfer.

Actionable insights.

FUZZY FRONT END
MARKETING
PRODUCT DEVELOPMENT
LAUNCH

Impactful decision making.

Learn more at www.curioninsights.com

••• special advertising section

8 TOP FOOD/ NUTRITION RESEARCH COMPANIES

Analyze consumer opinions through food and nutrition research to help you predict what items people will want next, why certain items are preferred and what adjustments should be made to improve future products.

These companies offer various benefits including consumer product testing and 3D interactions. Maintaining a competitive advantage is difficult but these companies offer insights that will help you stay on top!

Blueberry
Marketing & Sensory Research

Blueberry

Founded 2001 | 30 employees
Lisa McGurk, Vice President

A full-service marketing research consultancy, Blueberry combines expertise in sensory, product and marketing research. With fresh perspectives, high-touch service and 20 years of experience, we go beyond the numbers to find the story behind the data. Leveraging quantitative, qualitative and sensory techniques, Blueberry's research illuminates your product's landscape, uncovering the true motivators behind consumer choices, so you can build the best products. We're innovative. We're agile. We're storytellers. But, above all, we're

darn good researchers! Our insights help you delight your consumers, guide your innovation pipeline and bring clarity to your marketing and product development efforts. It's clarity to inspire action.

Phone 1-267-954-0440
www.blue-berry.com

CSS/datatelligence

CSS/datatelligence

Founded 1987 | 100+ employees
Carolyn Corbett, Vice President of Sensory Services

CSS/datatelligence offers sensory and consumer insights in both quantitative and qualitative arenas. We utilize our 35+ years of experience and our top-notch team to give our clients expert advice on test design, best practices and insightful reporting. From sensory scientists and a consumer psychologist to senior PMs, in-house DP, tables and analyses, we work as an integrated partner with our clients. Our research expertise focuses on consumer product testing – food and beverage, personal care, fragrances, cosmetics, etc. CLTs, HUTs and hybrid methodologies are the core of what we do. Our test studios include sensory booths, laundry facilities, test kitchens and focus and viewing rooms.

Phone 1-386-677-5644 x225
https://www.cssdatatelligence.com/

curion
Consumer Insights. Delivered.

Curion

Founded 2017 | 108 employees
Sean Bisceglia, CEO

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

Phone 1-224-632-1919
https://curioninsights.com/

Evaluative Criteria, Inc.

Founded 1973 | 20 Employees
Jason Steeg, President
Patty Bien, Executive Vice President

Evaluative Criteria Inc. (ECI) utilizes collaborative thought leadership and a highly communicative partnership to develop an inventive yet thorough research design to provide the insights needed to drive business decisions. We are staffed by research experts in specific business sectors, including food/nutrition and food service/restaurants. Our category and research expertise allows us to provide clients with a best-in-class experience and provide strategic insights for innovation, brand and marketing team decisions. ECI's capabilities include executing research both in person and online and range from small to large engagements. ECI is a CRG Global company.

Phone 1-914-631-1019
http://www.eci-research.com

Fieldwork

Founded 1980 | 250+ employees
Steve Raebel, President

Our specialties include B2B, consumer and global research. For over 40 years Fieldwork has recruited the highest-quality business, medical and consumer respondents both through and far beyond databases, using proven methods to reach your audience. We believe in a customized approach to recruitment. Fieldwork provides unsurpassed project management, hosting and complete guidance through in-person, remote/online and hybrid research sessions. Our technically versed support staff will confidently guide you through the logistics from large online to multicountry project execution. Fieldwork is your qualitative research partner. Focus on the research. We'll do the rest.

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

P&K Research

Founded 1957 | 250 employees
Richard Popper, PhD, CEO

Consumer product companies rely on us to deliver the data and insights needed to launch new products, evaluate existing markets and competitors and develop new formulas and features that save money or grab an increased market share. We're an end-to-end research partner providing qualitative and quantitative research (CLT testing, IHUT testing and online research) through our company-owned facilities in Chicago, Dallas, Los Angeles and New York and our field alliances across the U.S., Europe, Asia, Latin America and Australia. Our roots are in food and beverage, but our category expertise includes restaurant, personal care, home care and OTC medicines. P&K Research: partners in creating the world's best products.

Phone 1-800-747-5522
http://www.pk-research.com/

SCHLESINGER
GROUP

Schlesinger Group

Founded 1966 | 1400 employees
Mike Sullivan, President - Schlesinger Group

Simulate a real-world, in-store shopping experience in a controlled research environment with Virtual Aisle by Schlesinger Group. Virtual Aisle displays life-sized, high-resolution images of shopping environments, allowing researchers to quickly test merchandising placement, POS signage and branding elements and pricing strategies. Using a 3D interactive touch screen, customers examine products in more detail, just as they would in person. Gain a deeper understanding using mixed methods by collecting quantitative data before, during or after your shopper research when you add eye-tracking, post-shop surveys or shopper observations. Leverage this solution for your next food/nutrition research study at any of our U.S. locations. Connect with us: Qual@SchlesingerGroup.com.

Phone 1-732-906-1122
SchlesingerGroup.com

TASTEMAKERS
RESEARCH GROUP

TasteMakers Research Group

Founded 2010 | 10 employees
Andrea Poe, CEO

Consumer product testing reinvented. Located in Culver City, Calif., TasteMakers Research Group is a next-generation market research provider of high-performance consumer product testing solutions. With TasteMakers Research Group's proprietary PopUp CLT™ (consumer location testing) methodology, we reach hundreds of targeted on-the-go consumers effortlessly and seamlessly throughout the course of their daily lives. The PopUp CLT™ is the first product-testing solution developed to be both data-driven and consumer-focused to achieve fast, affordable and flexible consumer research for numerous business segments from start-ups to blue-chip companies. Our COVID-adapted agile research methods are ideal for safely conducting high-volume, quantitative in-person product testing with authentic qualitative insights. TasteMakers Research Group is a member of ASTM E1958-21 Standard Guide for Sensory Claim Substantiation.

Phone 1-323-533-5954
www.tastemakersresearch.com

Get your metric right

| By Greg Ryan

snapshot

Greg Ryan details his solution to an NPS problem.

Picture for a moment (if you will) the time, effort and money spent to build a survey draft, field it, tabulate and analyze data – only to find that the final overall metrics or scores the researcher used were faulty or misleading.

Not only has the researcher wasted their effort and their client's money but perhaps more importantly, they have squandered respondents' valuable time, to say nothing of the cost of incentives, etc.

Why is choosing the right customer metric so important to researchers? (In this discussion, when we say "customer metric" we are referring to overall customer satisfaction or customer loyalty metrics.) Many companies place great emphasis on KPIs like overall satisfaction or loyalty scores and include them in their corporate goals and compensation and/or bonuses. But what if the system of gathering and measuring these corporate goals and the resulting employee compensation was flawed? Not a good predicament to be in.

There are two metrics, which incorporate a five-point scale, that have been used for many decades without problems or flaws (provided the research is done correctly): the "gold standard" American Customer Satisfaction Index (ACSI) customer satisfaction question – "How satisfied are you with the following product/service?" – and also a standard loyalty metric question – "How likely are you to purchase X products or services in the future?"

I was employed as a research consultant for nearly four years at Kaiser Permanente, where I was responsible for research, metrics and executive interface for its largest lines of business (national accounts, strategic accounts, labor and trust, etc.). When I first joined Kaiser, executives were complaining that Kaiser's Net Promoter Score (NPS) appeared to be very unpredictable. I informed them that NPS was a volatile metric and that we should adopt a different one. The problem was, employee and executive compensation and scorecards were tied to NPS, so naturally the executives were hesitant to change. I suggested that we do a real-world customer metric comparison by having two loyalty metrics in the surveys versus just the NPS.

For a couple years, we used both the standard ACSI five-point loyalty metric question, "How likely are you to purchase X products or services in the future?" simultaneously with the NPS metric question "On a scale of 0 to 10, how likely are you to recommend Kaiser Permanente to a friend or colleague?"

At the end, we closely examined the differences between the two metrics (especially since employee and executive compensation were based on them). The results were conclusive: We found the NPS score to be of no value to Kaiser and further that it actually provided negative value because of its volatility. (While the NPS score fluctuated wildly, all the other question scores in the survey remained almost identical over the same period.)

Let's discuss the numerous significant flaws of the NPS scoring system and why NPS system failed:

- Begin with the NPS question and wording itself. The NPS question is based around measuring the respondent's likelihood to recominsights ASSOCIATION

fieldWORK

L&E research

GreenBook DIRECTORY

SCHLESINGER GROUP

FOCUS ROOM
POWERED BY FUEL

Clients truly appreciate the value in pure in-context research to understand the 'why'. Researchers definitely love the closer rapport and ability to observe or pick up on nuances they don't get over a video call. The insights delivered are 'more alive' and build even more compelling findings to our clients.
Jon Ward, VP of Sales at EMEA

While online tools are impactful in achieving many Qualitative research objectives, there is just nothing like having the face-to face interaction with our consumers and clients – something that online just cannot replicate. The interaction between Moderator and Respondent becomes more immersive and natural – body language is key when tapping into the System 1 which is integral in a lot of the work we do. Finally, the back room and client engagement is just as important – bringing key stakeholders together to workshop live during research is unmatched and super effective.
Paul Markovic, Director of Behaviorally

I have enjoyed helping clients return to in-person research. You can see the excitement as they leave, re-energized with a very enthusiastic "We'll be back!" I think this is something we are all experiencing in our lives as we also return to more social gatherings, making more interpersonal connections face to face. I have been very grateful for technology through the pandemic, but what once seemed like a suitable substitute now pales in comparison to the real thing.
Megan Pollard, President of Fieldwork Network

The rich and robust nature of in person research is the best avenue for much of the qualitative work to be conducted. We are fortunate to see this back to its full potential with questions answered, ideas generated and collaboration amongst so many. As the conversations flow, we are gaining the much needed information to move ideas, products and plans forward.
Debby Schlesinger

#facetofacemrx

Research mirrors society: something gets lost when our only form of communication is on a computer screen or telephone. Of course there are the three senses...taste, touch and smell...that cannot be replicated online. But there's also the fact that humans are social creatures, and make decisions based upon social influences. People behave differently when you meet them in-person versus how they respond on a FaceBook neighborhood group post, do they not? Research is no different.

Smart companies know new products and ideas cannot be tested solely online: they need to be exposed "in the real world", with people interacting together. Much can be learned from what people do and react, versus solely about what they say...just like the real world, researchers are remembering the value of in-person research, and the incredible learning.
Brett Watkins, CEO of L&E Research

FocusFORWARD

QUIRK'S MEDIA

i·view

Herron Associates, Inc.
Opinion and Marketing Research

JACKSON RESEARCH
A cut above

FUEL

ADLER WEINER RESEARCH

QRCA
Connecting. Educating. Advancing.

Extremely Dissatisfied	Very Very Dissatisfied	Very Dissatisfied	Nearly Dissatisfied	Dissatisfied	Neutral	Satisfied	Nearly Satisfied	Very Satisfied	Very Very Satisfied	Extremely Satisfied	Don't Know
0	1	2	3	4	5	6	7	8	9	10	

mend. First of all, many respondents would never naturally or formally recommend in the first place, so this is not a good question to ask. Therefore, a score of 9 or 10 doesn't mean respondents will actually recommend. Rather, likelihood to purchase (vs. recommend) is a better indicator in most cases. For an article published in 2008 in the MIT Sloan Management Review ("Linking customer loyalty to growth") a study found no evidence that NPS was the best predictor across customers' future loyalty intentions. The authors also attempted to find a link between NPS and growth, a part of the NPS measure that has been attractive to companies. They examined data from more than 15,000 consumers and 21 companies over multiple years. They then added in the growth rates for those companies. None of the range of metrics they examined, including NPS, was found to be a good predictor of growth. As the authors note, "Even when ignoring statistical significance (the likelihood that the correlations occurred by chance), Net Promoter was the best predictor in only two out of 19 cases." They conclude that, "based on our research it is difficult to imagine a scenario in which Net Promoter could be called the superior metric."

Also another example of problems with "likely to recommend" comes from a study titled, "Measuring customer satisfaction and loyalty: improving the 'Net-Promoter' Score," by Schneider, Berent, Thomas and Krosnick (2008), who found satisfaction is a stronger predictor than the likelihood of recommending.

- Measuring NPS is simply a case of asking the following question: How likely is it that you would recommend X to a friend or colleague? It uses an 11-point scale of 0 (not at all likely) to 10 (extremely likely) and, based on their responses, customers fall into one of three categories: Promoters respond with a score of 9 or 10; Passives respond with a score of 7 or 8; Detractors respond with a score of 0 to 6. Net Promoter Score is calculated by subtracting the percentage of Detractors from the percentage of Promoters. (The percentage of Passives is not used in the formula.) For example, if 10% of respondents are Detractors, 20% are Passives and 70% are Promoters, your NPS score would be 60 (70-10). Here's one example in which the NPS calculation provides flawed computational results: a combination of 20% Promoters, 80% Passives and 0% Detractors gives the same score as 60% Promoters, 0% Passive and 40% Detractors!
- Another NPS score computational issue is that NPS is not symmetrical (top-two boxes minus the bottom six).
- The NPS 11-point scale lacks labels on the scale to guide respondents (including no neutral label).
- Well-known researchers (such as Jon Krosnick, see below) have completed extensive studies mentioning that respondents have problems differentiating beyond a seven-point scale. In fact, this author cannot differentiate using an 11-point scale so I don't expect my respondents too either. To illustrate why an 11-point scale is so difficult to differentiate, the example above shows how ridiculous an NPS scale would look like if you put labels on the scale. Do you realistically expect your respondents to be accurate with this NPS scale, labeled or unlabeled?
- A score of 0 on the scale throws off respondents who are used to seeing a 1.
- In addition, reducing an 11-point scale to three points increases the statistical variability.
- NPS scores vary by industry.
- Sample sizes need to be increased for NPS.
- In a July 2007 Journal of Marketing article ("A longitudinal examination of Net Promoter and firm revenue growth") the authors offered empirical evidence using data from 21 firms and 15,500 respondents: "We find that when making an 'apples and apples' comparison, Net Promoter does not perform better than the American Customer Satisfaction Index (ACSI) for the data under investigation. [NPS creator Fred] Reichheld acknowledges the 'imperfections' in the analytics that were used to support Net Promoter. Unfortunately, the statistics matter."

The best empirical evidence about scale lengths is research provided by Stanford professor Jon Krosnick, who is viewed by many as one of the leading authorities on research and, specifically, scales. In systematic reviews, Krosnick and colleagues (Krosnick and Fabrigar, 1997; Krosnick and Presser, 2010) came to the conclusion that an optimal measurement – in terms of reliability, validity and degree of differentiation – could be achieved with five to seven categories. Respondents also preferred scales of this length.

In addition, an article by Peter Stuchbery ("Tracking KPIs with confidence") gave evidence that the NPS system requires larger sample sizes and must be increased by two to four times (in excess of 1,200 respondents for 95% confidence intervals): "In practice, based on analysis of actual NPS data across industries we have found that to reduce the error associated with NPS to be similar to that of a top-two box score, sample size needs to be increased in the order of two to four times, on average. For most tracking studies this is either not practical from a budgetary perspective or just not possible in terms of the numbers of respondents required."

All of the issues above contribute to the volatility of NPS and many others have experienced the same volatility with NPS – in my view rendering it not usable.

If you review the NPS flaws in detail – and there are many, from the NPS question itself to the scoring system and score calculations, etc. – and you're still not convinced of the NPS issues, I recommend you do like we did at Kaiser and run the NPS question and ACSI question wording (using a five-point scale) simultaneously in your surveys and see the results between the two metrics for yourself.

Greg Ryan is owner of Ryan Consulting. He can be reached at ryan.greg@comcast.net.

- ~~Send paper checks~~
- ~~Select individual gift cards~~
- ~~Pay international participants~~
- ~~Field recipient questions~~
- ~~Deal with 1099s~~
- Focus on research results

Shorten your to-do list.
Research incentives, made easy.

TREMENDOUS

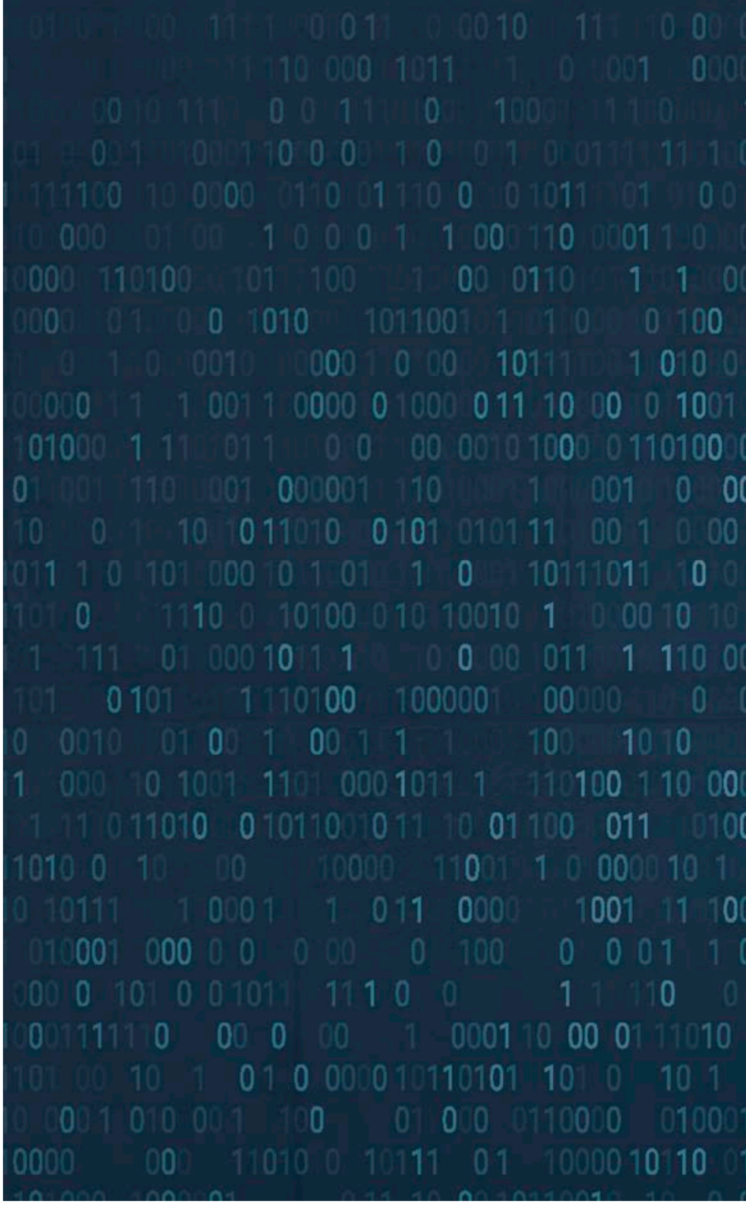
Get started for free at tremendous.com

••• cx research

Don’t leave them out

Why feedback from customers still matters in CX research

| By Mike Deinlein and Toby Zhang



snapshot

Behavioral and other data sources are a boon to marketers but they don’t tell the whole story of the consumer’s experiences with your brand.

The proliferation of customer data has made it easier than ever to create more engaging customer experiences and effective marketing tactics. But as companies become awash in customer data, some are considering eliminating traditional CX and brand-tracking survey systems in favor of purely database solutions. Why ask customers what they think when you can collect data on customer interactions and use that to predict churn, customer lifetime value, next-best actions and more?

The promise is alluring and companies should continue to invest in predictive customer analytics to deliver personalized and micro-moment interactions with customers. However, it’s clear that traditional survey systems still play a critical role in telling the whole story by filling the empathy gaps that database solutions alone often struggle to address.

Let’s explore some of the evidence that supports the use of surveys to reinforce the depth and relevance of insights derived from customer data.

A lasting advantage

Companies have recognized that real-time marketing and customer experience engines are core drivers of business value and are quickly becoming imperative to establishing a lasting market advantage. The business case is well-documented.

- Eighty-eight percent of customers believe that the service they receive is as or more important than the products a company offers.[1]
- Customers are 3.5x more likely to purchase from a business after a posi-

tive customer experience.[2]

- Businesses that invested in customer experience boosted revenue by 70%.[3]
- Nearly 10% of company revenues are at risk due to bad customer experiences.[2]

Recognizing the impact that customer data could have on creating more engaging, more personalized customer experiences, researchers and marketers invested heavily in tools, technologies and systems that enabled a deeper understanding of customer needs and motivations. Today, these tools produce, collate, analyze and operate on copious and varied sources of data to support the creation of more personalized, more relevant customer experiences. But before companies can craft personalized marketing and CX solutions, they need to identify the different data sources at their disposal and define what each brings to the table. The typical data stack has five primary components:

- direct feedback – solicited feedback with surveys or direct customer contacts;
- indirect feedback – what customers say about you in chat logs and transcripts, social media and service interactions;
- tracked behavior – omnichannel behavioral tracking from digital browsing, IoT, visitation, transaction history and service records;
- operational – organizational data on customer outreach, promotional information and marketing campaigns;
- financial – timing, frequency and volume of purchase, cost-to-serve and profitability.

Traditionally, direct feedback and survey-based measurement systems were the primary drivers for uncovering customer needs. By engaging customers and understanding their pain points, researchers could then envision solutions to address their frictions. And while many companies had other data that could help uncover greater insight around customer needs, they did not have the resources or tools to make sense of it all.

However, the accelerated pace of digital transformation and the introduction of technologies have made it easier to capture, analyze and understand indirect feedback, tracked behaviors and operational data. Consequently, these database solutions have allowed companies to leverage such data in forecasting churn, retention, customer lifetime value, next-best actions and offers, while also informing the deployment of personalized marketing content in the most effective channels. Natural language processing has made it easy to understand massive quantities of unstructured data in ways that seemed impossible just a few years ago.

While this proliferation of sources provides more opportunity than ever to discover and act on customer needs, it also presents challenges in knowing what data to use, when and for what purpose.

CX surveying will effectively be dead?

At a recent customer experience conference we attended, one of the keynote speakers made a provocative claim: By 2030, only 1% of customer data will come from surveys and the customer experience survey industry will effectively be dead. While the facts of this statement are sound, the conclusion is misguided.

The exponential growth of customer data isn't slowing. Direct feedback will inevitably become a smaller and smaller sliver of the overall data stack – perhaps only 1% of all customer data, as the claim suggests. But this relative reduction in size does not necessitate a corresponding decline in importance.

In fact, direct feedback provides the opportunity for a level of empathy that the other data sources often lack. It allows you to understand the why and the how of customer behaviors by engaging with them, listening to their pain points, understanding their workarounds and then crafting solutions that address those problems. We must acknowledge the strengths of direct feedback, while at the same time recognizing opportunities to augment and improve traditional measurement systems with behavioral database solutions.

As customer data grows more prevalent, solutions more predictive and business functions more automated, we believe that the need for management to maintain a direct source of feedback will become even more important. Our reasoning is both practical and philosophical.

A key feature of survey research that cannot be easily replicated via database or transactional data is what people say about who they are and why they do the things that they do. Consumer psychology tells us that direct responses collected through survey research are subject to various biases inherent in human cognition. They sometimes do not reflect what consumers truly think about a topic and, consequently, don't accurately predict future behavior. Yet, despite all that, surveys provide vital approximation of how consumers reason and rationalize in the course of their decision-making process. Their responses are analogues to System 2 – slow and deliberate thinking that constitutes the stories customers tell themselves to understand their own thinking, mindset and behaviors. Yes, relying solely on what people say inevitably leads to bias because people often say one thing and do another. But if we only observe what people do without hearing their rationale, we miss invaluable context on their underlying motivations, predispositions and personal aspirations.

Imagine a tale as old as time itself…

Let's say a customer was asked in a survey whether they are likely to purchase a box of Oreo cookies during their next trip to the grocery store. They say, "No way. I am trying to watch my weight and live a healthier life." But upon seeing those delicious cookies in the aisle, they put them in their cart – and promptly polish them off as soon as they get home. Proponents of predictive data analytics that rely exclusively on behavioral data may look at this as proof of the fallibility of survey research. In their view, a company would be better served by observing this customer's past behaviors, recognizing patterns in those behaviors and predicting that they are a suitable candidate for habit-loop consumption of tasty treats.

But a more nuanced view – built around the reinforcing insights from predictive and traditional methods – reveals something truly invaluable in this "conflict of self-interest." This potential customer may tell themself that they want to eat healthy but enjoy the taste of cream-filled chocolate cookies too much to pass them up; that means something.

So, armed with both sets of data, Nabisco can justify a healthy, low-calorie innovation that offers the same great taste its customers love. This individual feels happy that they are taking steps that align with their healthy-living narrative while still exhibiting purchasing behaviors that are beneficial to Nabisco. And so was born the Oreo Thins line of cream-filled cookies.

This vignette shows that to appeal to customers on a deep or emotional level, we need to consider the aspirational rationales that people have about their lives and life choices. And the best way to understand these aspirational rationales is to ask about, and listen to, the stories consumers tell.

A more holistic picture

Consequently, it is by effectively marrying self-reported survey metrics and behavior metrics that we get a more holistic picture of consumers, one that integrates both System 1 inputs (what consumers ultimately do) and System 2 thinking (why they think they did what they did). When we're implementing classification or predictive models at Burke, we often see notable accuracy improvements when both behavior and self-reported metrics are used in models.

One recent example involved a Fortune 500 utility provider. Our client needed help predicting the likelihood that customers would sign up for its green-energy programs. It had a wealth of internal behavioral and operational data, along with lifestyle enrichment data from a third-party provider. However, by layering on direct feedback from customers, we were able to create a model that could best predict program enrollment and delineate between the next-best green product for targeting its customers. Certainly, this provided an empirical benefit, but anecdotally, self-reported metrics also bring context to why people behave the way they do. Why is someone likely to sign up for paperless billing but less willing to sign up for clean-energy access programs? Layering on direct feedback provides a deeper level of insight to understand these nuances and inform business strategy.

Additionally, we must use survey metrics not only to mitigate risk but to validate and protect consumers from algorithmic bias. For example, behavior data can help us extrapolate more efficient pricing strategies through dynamic pricing. However, to ensure marketing tactics do not cause undue negativity among customers or treat customers in a way that is detrimental to certain subgroups, there needs to be a constant stream of direct consumer feedback to ensure marketing activities are working as intended. Unwittingly exaggerating an existing bias in marketing or using behavior levers that favor some subgroups without understanding how consumers feel can bring trouble in terms of both business outcomes and ethics.[6]

One of the more notorious examples of perpetuating bias is the COMPAS (Correctional Offender Management Profiling for Alternative Sanctions) algorithm, which is used to predict the likelihood of recidivism and act as a guide for when criminals are sentenced. An audit of the software found that Black defendants were almost twice as likely to be misclassified with a higher risk of reoffending (45%) in comparison to their white counterparts (23%).[7] While successful experience management is a stratospherically less serious topic, the lesson remains that companies need to be aware of their biases, recognize the burdens these biases place on certain customers and then make every effort to alleviate those burdens. One of the surest ways to uncover these pitfalls is through listening to direct feedback to bring empathy to behavior-only models.

Detailed the gaps

So how does this come together in practice? Let's look at customer experience as an example. Many publications have detailed the purported gaps of survey experience management. The most common objections are that survey systems are:[4]

- constrained – even the best survey-based management systems cannot reach every customer;
- reactive – surveys measure past experiences with a brand, so proactivity is inherently limited;
- unfocused – survey scores are rarely linked back to financial impact, so it is difficult to justify investments based on expected business value.

While these are valid concerns, the proposed solution to focus solely on automated, database customer experience management disregards the benefits of hearing directly from customers, as described earlier. To illustrate this point, take a common refrain from database solution-only proponents: Why use a survey to ask customers about their experiences when data about customer interactions can be used to predict loyalty?[4] The logical retort is "Define a loyal customer." More pointedly, "Define an advocate." Are you creating a remarkable enough customer experience that funnels prospects to your brand or an engaging enough experience that ensures your customers will ignore competitive interventions (like discounts or promotions) to stick with your brand? Or are you creating customers who only stay with you because they have not found alternatives? The easiest way to know what consumers actually feel is simply to ask them.

A customer can follow the ideal CX path. They can nail all the right touchpoints, move through the purchase cycle or service cycle in record time, hit all the behavioral interactions you were hoping they would ... but when they think about their experience, they can still be left dissatisfied. Database solutions will say there is low risk of churn

The power of Quirk's in the palm of your hand
Download the free Quirk's mobile app
GET IT ON Google Play
Download on the App Store
QUIRK'S MEDIA

Figure 1

		Traditional + Database-Automated
Constrained	Doesn't reach full customer base	Create non-response models to predict direct feedback and sentiment scores based on behavioral, operational and indirect feedback
Reactive	Measure past experiences	Create reinforcement models that account for behaviors and direct feedback to more accurately predict behaviors that matter (retention, upsell, cross-sell, compliance, etc.)
Unfocused	Not linked to financial impact	Leverage direct feedback and behavioral prediction models to demonstrate projected change in future behaviors and link changes in those behaviors to impact on customer lifetime value and profitability

but their human experience begs to differ. Humans are emotional and emotion is still difficult to predict – despite the advances in artificial intelligence and technology solutions attempting to do just that. That is why companies should see these two CX management systems as complementary rather than as surrogates for each other.

Figure 1 presents the three gaps and see how a complementary CX management system addresses them.

What's more, customer surveys can measure/assess the brand relationship by monitoring the holistic impression of your brand created by every interaction with your products, services, interfaces and people. Automated-database customer experience is a significant leap forward in terms of in-the-moment personalization, actioning and proactive needs recognition but it does not provide a complete pulse on the customer experience. Structured and solicited customer feedback allows you to create benchmarks by which to assess higher-order brand performance[5] and set priorities for CX investments and capabilities. Along the way, database CX solutions present additional opportunities to tailor customer journeys and improve customer retention and satisfaction, allowing you to then assess the impact in your relationship benchmark surveys.

The way of the dinosaurs

The capacity to elevate empathy, benchmark CX success and align to longer-term CX priorities will ensure customer experience and relationship surveys don't go the way of the dinosaurs. But what will soon be extinct are the traditional siloed customer insights from survey research. Survey systems must be tied to customer data lakes and behavioral or operational data to understand what interventions, touchpoints and journeys drive the higher-order relationship metrics measured through your CX surveys. Similarly, those higher-order relationship metrics must be linked to core financial metrics and goals to create a direct connection between improved customer experience and ROI.

Leveraging predictive database models and journey analytics alongside survey-based measurement systems provides the most complete pulse on your customer experience and can allow for more intelligent investment and decision-making. Relying solely on one or the other brings to mind the parable of the blind men and the elephant, where each blind man feels a different part of the elephant and offers a wildly different account of what an elephant is.

See more opportunities

So, where do we see the best practices in dynamically utilizing survey and other customer data sources? It depends. In general, where firms can capture more personalized consumer data – and where consumer choices and engagement levels are high – we see more opportunities and more successful cases of integrating direct feedback and behavior data sources.

For example, the hotel industry captures several types of consumer information through loyalty programs and consumers are often highly engaged with the choice of hotels, amenities and experiences. Integration of direct feedback and behavior in such an industry thus proves to be fertile ground for dynamic modeling and insights. Other industries with similar dynamics that benefit greatly from such an approach include telecommunication, consumer electronics, tech, automotive industries and e-commerce in general.

Similarly, the solutions that are boosted by such dynamic approaches include segmentation, next-best action types of recommendation engines and various predictive and classification models, as well as strategic consultative projects that seek to increase loyalty and reduce churn.

At the end of the day, we need our marketing and customer experience solutions to be more than just predictive. We need these critical avenues of emotional connection to be aspirational and inspirational to consumers and businesses alike. And, for that to happen, we need to have a deep appreciation of both what consumers say and what they do.

Mike Deinlein is vice president, CX solutions at Burke, Inc. He can be reached at mike.deinlein@burke.com. Toby Zhang is vice president, senior consultant, decision sciences at Burke, Inc. He can be reached at toby.zhang@burke.com.

REFERENCES

1 Salesforce: We Bring Companies and Customers Together. Salesforce, Salesforce, Feb. 1, 2022, https://www.salesforce.com/content/dam/web/en_us/www/documents/research/salesforce-state-of-the-connected-customer-fifth-ed.pdf.

2 Temkin, Bruce, et al. 2022 Global Consumer Trends. Qualtrics, https://success.qualtrics.com/rs/542-FMF-412/images/2022-Global-Consumer-Trends-Report.pdf.

3 2022 Twilio State of Customer Engagement Report, https://www.twilio.com/state-of-customer-engagement.

4 Prediction: The Future of CX. McKinsey & Company, July 12, 2021, https://www.mckinsey.com/business-functions/growth-marketing-and-sales/our-insights/prediction-the-future-of-cx.

5 What Customer Feedback to Collect - and When. Qualtrics, July 21, 2022, https://www.qualtrics.com/experience-management/customer/collecting-customer-feedback/.

6 "Huge 'foundation models' are turbo-charging AI progress." The Economist, June 11, 2022, https://www.economist.com/interactive/briefing/2022/06/11/huge-foundation-models-are-turbo-charging-ai-progress.

7 "5 examples of biased artificial intelligence." Logically, July 30, 2019, https://www.logically.ai/articles/5-examples-of-biased-ai.

RACE AROUND THE WORLD
FOR EDUCATION
MREF Marketing Research Education Foundation

WALK. BIKE. RUN. GIVE.

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

Thanks to our generous sponsors and **1,300+ PARTICIPANTS,** we raised more than **$132,000** and logged **97,000+ MILES.**

baal dan®
helping children in need
BAAL DAN CHARITIES

We came together as an industry and "walked around the world" to benefit Baal Dan's efforts to aid children displaced by the war in Ukraine.

TOP FINISHERS

Walking

1. Paula Michaels, *Fuel + The Focus Room*, 315.5 miles
2. Felix Tunon, *Schlesinger Group*, 284 miles
3. Haroon Mir, *Ipsos*, 274 miles

Running

1. Anshuman Saha, *PureSpectrum*, 325.3 miles
2. Mark Parry, *Zappi*, 302.6 miles
3. Stacey Lucerini, *Schlesinger Group*, 282.4 miles

Biking

1. Haroon Mir, *Ipsos*, 965.4 miles
2. Tushar Dhamapurkar, *Global Survey*, 953.2 miles
3. Cheryl Muldoon, *Schlesinger Group*, 862.4 miles

Other (Swim, Skate, Etc.)

1. Steven Zawada, *PureSpectrum*, 163.8 miles
2. Mark Bishop, *Multilingual Connections*, 156.5 miles
3. Paula Michaels, *Fuel + The Focus Room*, 127.5 miles

OUR MISSION

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

MREF Marketing Research Education Foundation

MRGivesBack.org

••• cx research

A new customer for customer insights

How marketing research can benefit – and benefit from – the quality function

| By John Goodman

snapshot

As quality moves beyond a product-centric focus, insights teams have an opportunity to prove their value to another internal organizational group.

The quality function presents a large opportunity for enhanced research and impact for both customer insights and market research. Many readers may roll their eyes at that statement and either think, "Old news!" or "Not much there." You will be wrong in a majority of organizations because the quality profession is undergoing a radical reinvention of itself. It is just now starting to recognize how customer experience has changed its mandate and data needs.

Traditionally, quality methods and metrics have applied solely to physical product quality. Measuring product quality was relatively simple because the answer, to a degree, was yes or no – either there was a defect or not. The zero defects concept, as described by James Halpin and popularized by Philip Crosby, was, in retrospect, a product of a simpler time.[1] [2]

Enter the concepts of services (vs. physical products) and customer experience (CX). In 1984, Lynn Shostack introduced the service profit chain.[3] Customer Care Measurement & Consulting's (CCMC) predecessor, TARP, explored complaints and the impact of consumer problems on loyalty and word of mouth for the White House Office of Consumer Affairs.[4] Also, Business Week highlighted TARP's complaint and service research as key to the marketing success of GE, GM, Coors and American Express and the implementation of toll-free numbers to enhance customer access.[5] In addition, Joe Pine introduced the concept of customer experience (CX) in The Experience Economy.[6] Fred Reichheld suggested how to quantify the loyalty implications of a poor CX and customer dissatisfaction.[7] The American Society for Quality (ASQ) established a Services Quality Division (SQD) in 1991.

Even with all the above attention and activity, most of the nearly 100,000 American quality professionals in ASQ still see the key objective and definition of the quality function as being zero defects, meaning zero physical defects. In a recent conversation, the 2022 chair of the ASQ SQD, Ryan Politis of Lowes Inc., noted that he still gets asked, "What is ser-

vice quality and how do you measure it?”[8] This is the big opportunity for customer insights! You can take the lead in helping the quality function define and measure CX.

Almost a blank check

In manufacturing companies, quality was table stakes and the basis of competition. In many technology companies like Cisco Systems and Apple, manufacturing quality was critical but, due to the complexity of the product, ease of use and quick-start guides were also important to success. Therefore, in many leading companies, quality received almost a blank check as well as responsibility for CX. At Cisco Systems, the EVP of quality was also responsible for CX. This trend has now defused through the rest of both manufacturing and services. For instance, at one of the largest satellite internet companies, the SVP of quality also has responsibility for CX. Therefore, if customer insights desires to be a key player in CX, it must engage with and support the quality function.

Quality needs help from customer insights in meeting four challenges: multiple uses; emotional and expectational outcomes; going beyond satisfactory to delight; and moving the business case from cost savings to one based on enhanced loyalty, word of mouth and delight. While quality is staffed by bright industrial, chemical and civil engineers, they are not equipped to deal with any of these four challenges.

1. Multiple product/service uses and outcomes

Unlike in the past, now there are multiple ways a product or service can be used, leading to multiple customer expectations of outcomes, depending on customer needs and the marketing message.

Quality can no longer simply be defined as adherence to physical specifications just adherence to a single physical spec – for example, adherence to a single width and length with a tolerance of plus or minus 1 millimeter. Quality performance must be defined by the market segment to which the customer belongs. For instance, rental car company Avis asks the customer which segment they are a member of, e.g., I like the premium cars with the latest technology, vs. I’m a business renter who wants four wheels to get out of the airport at a low cost, vs. I’m Aunt Tillie on vacation. Each of these segments has totally different needs and expectations.

2. Emotional and expectational dimensions

In addition to physical dimensions, there are communication, emotional and expectational dimensions to most products and services that often are more important than the physical product.

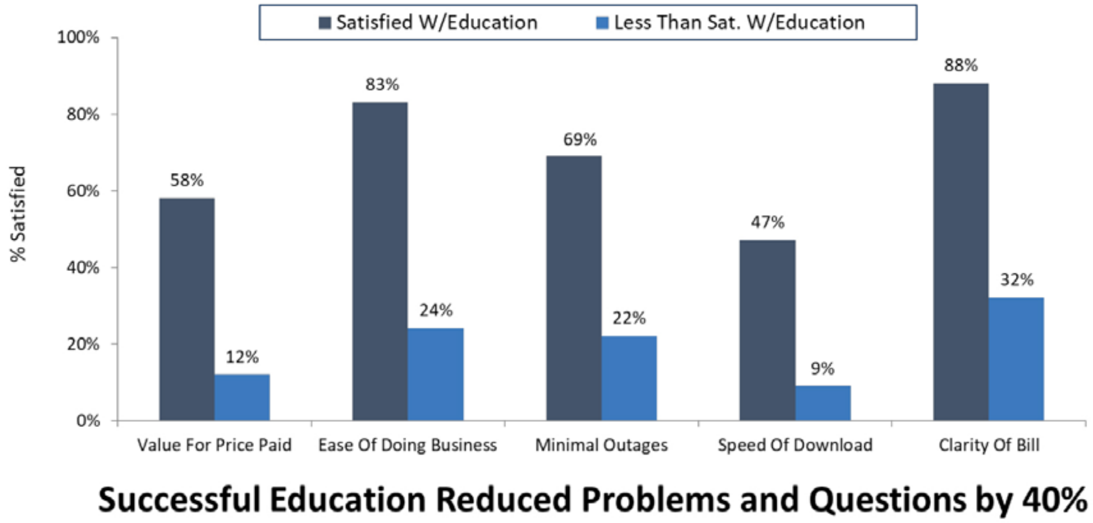
The role of the quality function must be broadened to include much more of the company operations. Quality must be involved not only in production and manufacturing but also in design, marketing and sales, delivery of the product and customer onboarding. When renting a car, some customers will appreciate being shown where the headlight and wiper switches are as well as being assisted with directions. Others may view this as an impediment to getting on the road. Measuring the delivery of the rental car with the correct level of communication and emotional connection is a completely foreign concept for the majority of quality engineers.

Such communication during product delivery can have dramatic impact on customer evaluations of the performance of technology. Figure 1 shows the results of a 2021 survey of over 2,000 customers on the impact of satisfaction with onboarding education vs. the percentage of customers satisfied with key operational attributes of internet service. Effective education reduces customer dissatisfaction by 40-50 percent across all key internet performance attributes. It is much cheaper to educate and onboard than to spend $200 million on extra infrastructure to enhance performance.

3. The top rating is no longer “meets spec” but can often be “delighted”

Research has now shown that CX can exceed a customer’s needs and expectations in a manner that creates delight. This implies that the experiential dimensions of the product or service can be as important to the customer as

Figure 1: Impact of satisfaction with initial education on ratings of ISP on key performance dimensions[9]



the physical product. Therefore, simply making the product lighter or larger or have a longer-lasting battery may or may not be important to the customer. On the other hand, a product that was more intuitive or was accompanied by an engaging "how to use" video might create delight.

The 2021 CCMC National Delight Study of 2,519 affluent consumers found that behaviors such as enthusiasm, transparency in marketing and empathy created delight and that consumers who were delighted were 8% more loyal than those who were just completely satisfied.[10] Further, a third of consumers would pay more and many would spread positive word of mouth. Figure 2 summarizes the findings for the subsegment of consumers who were delighted with experiences in the financial services arena.

In the chart, honesty and transparency were the most prevalent delighters while enthusiasm, interest and empathy were simple, easily delivered delighters. As shown in the upper middle of the chart, customers who were delighted were 30 percent more willing to pay more for the same product or service (47% vs. 17%).

The middle of the chart shows the impact of word of mouth from customers who were delighted. When customers were delighted, 74% of them told other friends and acquaintances about the experience. An average of six people were told about their experience and of those, 57% were reported to have taken action on the referral. Multiplying these impacts together suggests that for each delighted customer, more than two new customers may have been won. While this may be optimistic, even if the number is cut by two-thirds, we can still surmise that each delighted customer will produce one new customer.

Finally, in the upper right-hand corner, we see that 37% of the delight was delivered by telephone while 40% by digital channels including e-mail or chat. The surprising fact here is that delight can be delivered digitally in addition to face-to-face and telephonic communication. With artificial intelligence being used to drive more customer response tools, there is a large opportunity to enhance CX via improved automated response. On the other hand, poor automated responses can do great damage.

The insights function must work with quality to improve evaluation of these transactions, measuring satisfaction, delight and willingness to recommend by type of issue and by channel used. The analysis of the outcome metrics (e.g., loyalty and willingness to refer) should address the types of behaviors that can create delight by going beyond the standard spec – especially in ways that add extra value to the product that the customer will pay extra for and spread enthusiastic positive word of mouth. This whole subject area is foreign to most quality professionals.

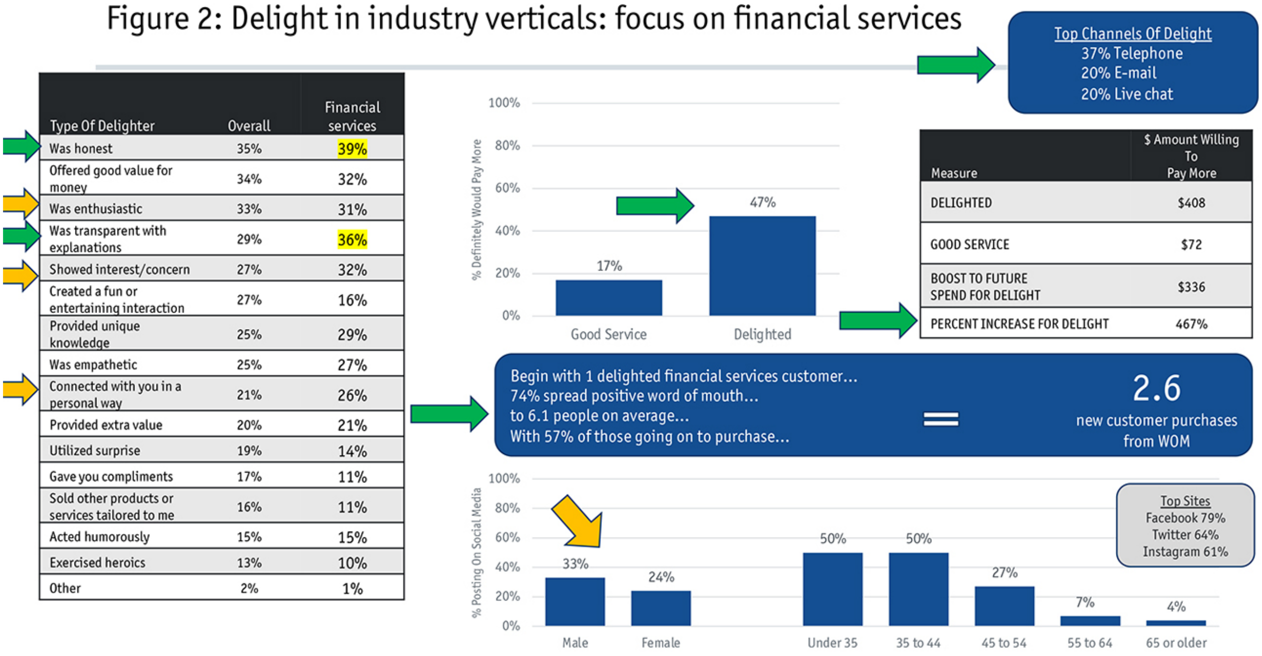
4. Business case based on loyalty and WOM impact

Quality traditionally created business cases based on reduced material waste and zero defects. The usual sources of data for quality are complaints and warranty claims. Often there is overlap between those two sources because the more serious complaints turn into claims where the company replaces or repairs the product at significant expense (think auto warranty claims). The basic flaw in the analysis done by quality is the assumption that the only damage done is the cost of responding to the reported problems.

Quality's engineers need assistance in creating a business case for CX investment based on enhanced loyalty, revenue, margins and word of mouth produced by emotional interactions. Often the receipt of a few dozen or even 100 complaints is looked upon by quality and marketing as being a minor issue. What quality professionals and other executives often miss is the fact that only a small percentage of consumers take the time to complain about the problem.

CCMC's research has shown that even in the auto industry, more than half of failures never turn into complaints or warranty claims and in the

Figure 2: Delight in industry verticals: focus on financial services



Top Channels Of Delight
37% Telephone
20% E-mail
20% Live chat

Type Of Delighter	Overall	Financial services
Was honest	35%	39%
Offered good value for money	34%	32%
Was enthusiastic	33%	31%
Was transparent with explanations	29%	36%
Showed interest/concern	27%	32%
Created a fun or entertaining interaction	27%	16%
Provided unique knowledge	25%	29%
Was empathetic	25%	27%
Connected with you in a personal way	21%	26%
Provided extra value	20%	21%
Utilized surprise	19%	14%
Gave you compliments	17%	11%
Sold other products or services tailored to me	16%	11%
Acted humorously	15%	15%
Exercised heroics	13%	10%
Other	2%	1%

Measure	$ Amount Willing To Pay More
DELIGHTED	$408
GOOD SERVICE	$72
BOOST TO FUTURE SPEND FOR DELIGHT	$336
PERCENT INCREASE FOR DELIGHT	467%

Begin with 1 delighted financial services customer...
74% spread positive word of mouth...
to 6.1 people on average...
With 57% of those going on to purchase...
=
2.6
new customer purchases from WOM

Top Sites
Facebook 79%
Twitter 64%
Instagram 61%

pg 0: 2021 CCMC Delight In Affluent Consumer Groups Study

CPG industry, complaint rates to the company are often only 10% (https://bit.ly/30ISHi1). Therefore, for each problem reported, there are many more that are not but still result in damage to loyalty and word of mouth. A cost-reduction business case fails to include the non-articulated complaints and also overlooks the revenue damage. Further, there is usually no provision for the word-of-mouth impact of problems. These exclusions lead to a gross underestimate of the payoff of enhanced CX. The quality function will enthusiastically embrace this approach but will require assistance in its construction.

Further, complaint rates vary by the type of problem the consumer encountered. The critical question is, how many problems exist for each complaint received? This ratio of problems to complaints is called the multiplier. To estimate the real number of problems that exist in the marketplace for each complaint received, one must multiply the number of complaints by the multiplier. Then the revenue damage is estimated by multiplying the number of problems by the value of the customer.

Where does one derive the multiplier for any particular industry? Via a survey of a random sample of customers from that industry where you ask four questions:

1. Did you have any problems with the product or service?

2. What problems did you encounter? (Ideally aiding the customer with a granular list.)

3. Did you complain or seek assistance from the company?

4. If so, where did you go to seek assistance and what channel did you use?

Those four questions will allow you to quantify the multiplier for any particular channel of complaint. For example, if 10% of customers who had problems complained via the toll-free number, you know the multiplier for complaints received by phone is 10. The existence of the multiplier is a shock to many quality professionals who have assumed that almost all customers with problems complain. Quality professionals have simply been inwardly focused during their career.

The equation for calculating the revenue damage of a particular problem based on complaints is shown in Figure 3.

If the revenue damage estimate is based on a survey of a random sample of

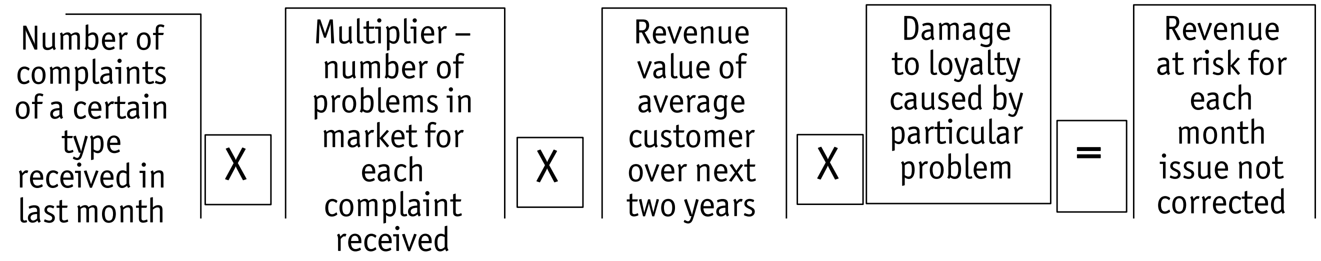
There's a lot on the line.

Telepoll
MARKET RESEARCH

TELEPHONE DATA COLLECTION
CATI • B2B/B2C • LOW INCIDENCE • ONLINE RESCUE
1.800.743.6443 • telepoll.net

ANNIVERSARY 30 YEARS ANNIVERSARY

Figure 3: Quantifying revenue at risk based on complaints


Number of complaints of a certain type received in last month
X
Multiplier – number of problems in market for each complaint received
X
Revenue value of average customer over next two years
X
Damage to loyalty caused by particular problem
=
Revenue at risk for each month issue not corrected

customers, there is no multiplier because the results of the survey are projectable on the marketplace. You simply multiply the percentage of customers encountering the problem times the damage to loyalty times the value of the customer to arrive at the revenue at risk due to a particular problem. Our firm recommends that at least one random sample survey of customers be conducted every two years to allow quantification of the overall multiplier for each company. This is a project that the insights function should drive but often the quality function will pay for. A more sophisticated study including word of mouth and sensitivity to price will allow inclusion of the CMO as a data user as the CMO is the officer most concerned about word of mouth and margins.

Creates a strong synergy

An alliance of quality and customer insights creates a strong synergy, leading to greater impact and improved customer satisfaction. In a benchmarking study of 200 companies, CCMC found that companies where quality and customer insights jointly collected and actioned the voice of the customer had twice the year-over-year improvement in customer satisfaction and a much higher rate of key CX issues being quickly addressed by top management.[11]

While the quality function will be most interested in how to create a more compelling business case for its projects, customer insights should start by educating quality analysts on the broader range of opportunities afforded by the end-to-end customer journey, the impacts and challenges of applying quality to sales, marketing and customer onboarding and the technical implications of applying the multiplier to complaints and warranty data. Draw their attention to the article in their own journal, Quality Progress, on applying quality to marketing and sales.[12]

Following are five steps to win quality as a new customer and source of both support and resources:

1. **Work with the quality function to map the basic end-to-end customer journey.** To this basic journey add the usually forgotten support functions of complaint solicitation, the full range of customer service channels as well as mechanisms for capturing the VOC across the entire journey.

2. **Help quality identify key customer segments and expectations as well as physical performance aspects.** Confirm the journey with a focus group or sample of customers from each segment.

3. **Focus outcome and impact metrics especially on marketing and sales and education/onboarding.** Identify which channels customers prefer and which lead to the most educated customer and the fewest unpleasant surprises. Work with digital marketing to try different incentives to motivate customers to be educated.

4. **Expand quality performance metrics to include delighted and help quality plan and execute pilot tests where customer insights provides measurement assistance.**

5. **Assist quality in creating a revenue-based business case for enhanced CX where insights quantifies possible payoffs in terms of incremental loyalty and more impactful WOM referrals.**

Create a win-win-win

The quality function has a seat at the C-suite table in many organizations that the customer insights function lacks. At the same time, the advent of CX has totally disrupted business as usual for quality while increasing both resources and expectations. Customer insights should move to help this engineering function address the social science and behavioral measurement issues to create a win-win-win for both functions and, most importantly, for the customer.

John Goodman is vice chairman of Customer Care Measurement and Consulting. He can be reached at jgoodman@customercaremc.com.

REFERENCES

1 James F. Halpin, Zero Defects: A New Dimension in Quality Assurance, McGraw Hill, 1966.

2 Philip Crosby, Quality Is Free, McGraw Hill, 1979.

3 G. Lynn Shostack, "Designing services that deliver," Harvard Business Review, January 1984.

4 Increasing Customer Satisfaction, Report Summary, U.S. Office of Consumer Affairs, 1986.

5 "Making Service a Potent Marketing Tool," Business Week, June 11, 1984, p. 164-167.

6 B. Joseph Pine II and James Gilmore, The Experience Economy, Harvard Business School Press, 1999.

7 Fred Reichheld, The Loyalty Effect, Harvard Business School Press, 1996.

8 Conversation with SQD Chair Ryan Politis, director of productivity office of Lowe's financial planning and analysis division, February, 2022.

9 Survey of internet service provider customers in 2021, CCMC proprietary study.

10 John Goodman, Othmar Mueller von Blumencron, "Making delight intentional," Contact Center Pipeline, December 2021.

11 John Goodman and Thomas Hollman, "Factors leading to an impactful voice of the customer process," Contact Center Pipeline, October 2019.

12 John Goodman and Ken Feldman, "Quality's new frontier, applying continuous improvement tools to marketing and sales," Quality Progress, June 2017.

Join MREF's Third Annual

Backpack Challenge

Help us send 2000+ new backpacks full of essential school supplies to under-resourced students throughout North America.

$25 = SMILE

Your $25 gift ($30CAD) helps a student start the year with a smile. Help us reach our goal to fund and distribute 2000+ backpacks again this year.

GIVE TODAY

MRGivesBack.org

KITS FOR A CAUSE

KIDS IN NEED FOUNDATION

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

BACKPACK
challenge

Did you know:

10 million
American children live in poverty*

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

Arrive to class without all the requested and necessary school supplies

Do not have adequate school supplies at home to complete school work

Run out of supplies and their families aren't able to provide replacement supplies

MREF
Marketing Research
Education Foundation

OUR MISSION

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

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

••• cx research

Preserving institutional memory

The value of insights storykeeping in the turnover era

| By Nick Freiling

snapshot

How data repositories can help CX teams maintain continuity in the face of change.

The Great Resignation. The Great Reshuffle. The Big Shift.

Whatever you call it, the reality is this: Turnover on insights teams has probably never been higher. More researchers on more insights teams have spent more hours onboarding this year than ever before.

And while fresh perspectives can add immense value to research efforts, this new turnover era also ushers in a host of new challenges.

How can brands maintain a continuous research program while their insights team roster is in constant flux? What does longitudinal research look like when tools and methodologies shift (even if only slightly) with every new onboard? And how can insights managers cultivate buy-in from team members who are used to doing things differently?

For CX teams, especially, this can be uniquely challenging. CX is organization-specific – there is no syndicated solution for accessing or measuring your brand's key CX performance metrics. And without strong institutional context on how CSAT patterns have shifted in recent years, CX teams can struggle to add value without duplicating research and results.

The fact is: CX teams – and all insights teams – need to become storykeepers. And this is never more important than in high-turnover environments.

No matter how many new names may be on the HR rosters, a brand's customers are part of a long, extended story. What happened to a customer last year matters today. What happened to them pre-pandemic still matters now. And without a strong grasp of how their customers' story started, CX and insights researchers can't point their organization in the right direction today.

Good insights is about storykeeping. Integrating story-friendly methodologies and solutions into your CX workflows will help make sure you maximize the value of your historical research and move forward in a data-driven manner.

's your story?

Change with the times

"I don't care how my predecessor did things. This is how I do things." We've all heard that – if not in so blatant of terms, then couched in more polite jargon. Level-set. Recalibrate. You get the idea. And in many ways, recalibration – especially on an insights team – can have a cleansing effect. What adds value today, of course, might not be what added value in the past. Research methods and tools can and should change with the times. And innovation in research technology (ResTech) tools makes it easy for insights teams to level-up their toolkit quickly.

But insights, especially CX, is bigger than the tools used to create them. And it's not something that's easy to start from scratch.

While a new ResTech app might mean researchers can move quicker, it doesn't ensure that insights are being stored, interpreted and distributed in a way that adds value to the insights bottom line – that is, the impact that an insights team's deliverables has on your NPS or CSAT. Because it's ultimately researchers, not apps, that know what parts of their customers' story matters most.

Further, while ResTech makes it easy to dive deeper than ever before into customers' perceptions, it can also distract from the deeper work of integrating that data into your brand's CX story. It's no secret that most insights teams are awash in more data than they know what to do with. Nor is it a secret that innovation in ResTech has, in recent years, been more focused on data-gathering than on storing and story-fying that data.

Long story short: Enhancing your insights team's ResTech and data-gathering capabilities doesn't necessarily add value to your insights bottom line. And worse, certain kinds of ResTech can distract researchers from storykeeping – that is, the content brands depend on to ensure a consistent and progressive CX research program across researcher (and customer) generations.

Shouldn't be a chore

What does insights storykeeping look like, day-to-day? How can today's in-flux insights teams keep and tell stories whilst so many members of their team come and go? The first thing to remember is that this shouldn't be a chore. An effective insights storykeeping system – aided by the right technology – should work in line with the research your insights team is already doing. No going back to document, map or narrative-craft on top of insights your CX team is already generating.

Here are some tips to ensure stories are always integrated into your insights workflows.

First: Adopt consistent research methodologies at the highest level of your organization.

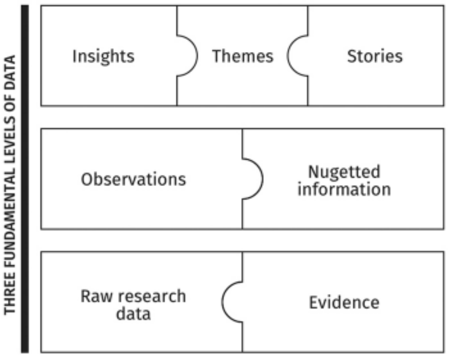
This doesn't just mean executives who embrace the idea of insights. It means having a C-suite that is in-the-know about how your organization is measuring, calculating and interpreting your customer experience KPI metrics and who can help keep the insights story alive.

A quick anecdote…

We recently worked with a CPG branding consultancy with an executive team of eight that had turned over 50% in the prior year. Four members of this team had been hired within the prior 18 months.

Understandably, catching them up on the

Figure 1



KEY ELEMENTS OF DATA THAT RESEARCH REPOSITORIES SHOULD HAVE

terms and tools of their CX product suite was a high-priority item. We laid out how their predecessors had used technology to measure CSAT over time and how recent changes to their product and branding had influenced CSAT scores.

Right away, eyes glazed over.

This was a lot of information but there really was no way around it. But rather than integrate their expertise into what had already been done, this team decided to level-set. It's easier to start fresh, they said, than to try and understand what had been done before.

This was painful to watch. What's lost with this approach is invaluable. CSAT is a story and stories can't be restarted. What happened in the past matters today and the future will always incorporate what happened before – there's just no way around it. Storykeeping is essential.

Without a C-suite that is both educated about and committed to a story-driven CX research methodology, you can expect slow progress toward boosting CSAT.

Second: Embrace an insights-specific repository application to ensure every insight is recorded, operationalized, and searchable.

Admittedly, this has not, to date, been easy for insights teams. Most attempts to solve the problem of functional, value-adding insights repositories have cut corners and failed to account for the unique nuances in UX, CX and market research workflows. Coupled with the fast pace of innovation in other insights technology, this has made it hard for repository applications to keep pace. Platform rigidity and (ironically) poor UI/UX have presented repository developers with significant challenges in persuading insights managers of the value of investing resources (including their time) into maintaining a clean insights repository that is up-to-date with their research.

Fortunately, this is changing. Innovation in knowledge management applications has accelerated in recent years as a response to the proliferation of data-harvesting technologies. Further, insights-specific repositories are a brand-new class of applications, usually designed by insights professionals (including researchers) and built with the unique needs of insights teams at top-of-mind.

At the highest level, an insights repository supplies the content for the stories that undergird any serious CX program (Figure 1). And by nature, this content survives across research teams and generations.

Insights repositories are an insights team's storykeeping engine.

Third: Take distribution seriously and get creative while doing it.

There's no law that says insights deliverables have to be wonky. While insights jargon can be hard to avoid, "inside baseball" isn't something to strive for when distributing insights.

The fact is, insights are valuable only insofar as they are distributed, understood and operationalized. Insights storykeeping is about putting insights into context and creating a system whereby new insights are, by default, interpreted as part of a progressive research program – not a series of isolated snapshots. Aided by an accessible insights repository, insights distribution (for CX, in particular) should create the next chapters in your brand's experience improvement story such that any team member can get up-to-date quickly, even in times of high-turnover.

What does this look like?

At the least, it means a repository of insights that is accessible organization-wide. No silos. No barriers between insights consumers (marketing, product, executives) and insights producers.

And it means an intuitive taxonomy of insights content that's built into your insights team workflows. This does not mean requiring researchers to go back and craft a narrative about what they did and how they did it. It does mean aligning insights workflows with insights distribution such that the insights story emerges by default and so any consumer has full transparency into the research tools, methods, source documents and raw data used to compose the key findings that matter to them.

Easy to appear productive

The bottom line is this: Good insights are about stories, not data.

That's no secret, of course, to the best insights professionals. But when turnover on insights teams is high, the temptation to overemphasize data procurement is strong. New ResTech makes it easy to appear productive, even while your insights team may not be plugged in to your brand's ongoing CX narrative.

But simply gathering more data when your team is already swimming around in more of it than they can possibly interpret is inefficient at best and a total waste of resources at worst. It's precisely in times of change that storykeeping is most important.

Nick Freiling is the director of InsightsHub at QuestionPro. He can be reached at nick.freiling@questionpro.com.

QUIRK'S
TALENT

Executive Recruiting for
Market Research and Insights Professionals

COMPANIES + CANDIDATES

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

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

www.QuirksTalent.com

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

••• product research

Beat the clock

Using video technology to keep up with the rapid pace of change

| By Lincoln Merrihew

snapshot

Faced with "research compression," how can researchers add more "human" to human factors analysis?

Until robots rule the world, people can enjoy the rapidly evolving ability to integrate with all the machines and technology around us. That integration is designed to make our lives better and easier. Well, that's the intent: everyone has experienced the gaps between design intent and the successful execution of design. And with technology, design refers not only to the look and feel but the functional aspects as well: the menus, the screens, the graphics, the ability to accurately process voice commands, the latency of responses and the ability of one technology to effectively communicate with another.

The good news is that modern technology can often be enhanced quickly, such as via over-the-air updates in vehicle telematics and updates to cellphone apps and operating systems. Yet that's also the bad news. That speed means that marketers and others may rush technology to market to appear innovative before things are fully ready. And that means that technology may be launched when only 80 percent ready – or less. (Some of those companies believe that's OK because the remaining 20 percent can be added later.) Together that means consumers experience partially baked solutions, which is good for neither brand nor customer.

The results of these shortcomings vary widely, from dissatisfaction to frustration to even danger. Our firm's testing has revealed instances when, for example, a driver was unable to disengage speed control in a vehicle locked at 25 mph when the posted speed was 40 mph. The driver tried voice commands and screen touches. At one point, when the driver said, "Increase speed," the vehicle responded by increasing the speed of the fan.

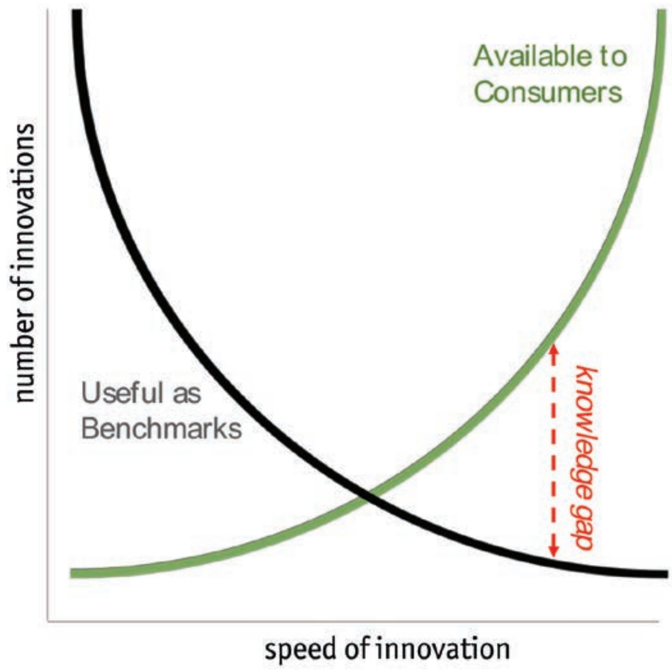
Then there's the ancillary fallout on marketing researchers. Rapidly developed technology means less time to complete quality research, including human machine interface (HMI) research – never mind the impact and implications of things being half-baked. We see that pain across several of our business partners and have deemed it "research compression"– a drastic shrinking in the amount of time available to make crucial decisions.

Imagine having to wait months for customer research and by the time you have it in your hands and have processed it for insights, the technology in question has already been updated. Or even replaced. You're looking at results for Version 21 and yet consumers are now working with Version 35. Or maybe there's a Version 36 that was released without notice. And the speed of releases also means the competitive landscape changes every minute.

Layered on top of that is the lack of benchmarks in many cases: some technology is so new there are no viable comparisons or points of reference, meaning historical data and insights do not apply. If fact, the applicability of benchmarks is inversely proportional to what's available to customers. As the speed of innovation increases, there are more choices for consumers and at the same time fewer relevant benchmarks. They're inversely proportional (Figure 1), resulting in an ever-larger HMI knowledge gap.

The combination of research compression and a growing HMI knowledge gap can lead to embarrassing and tragic results that can destroy brand equity in much less time than it takes to create. For example, based on technical specs and user needs also, a coffeemaker might seem perfect for making soup. Consumer research would show otherwise.

Figure 1



Everyone wins

The science that informs the interaction between people and machines is called human factors analysis. The by-product of research compression and the HMI knowledge gap is that there is not enough "human" in human factors analysis. Fortunately, that same rapid advance of technology can shift that balance by putting more technology into research. When done successfully, everyone wins: consumers, brands and researchers.

There are three core facets of research technology to ensure relevance around gathering, processing and accessing: gathering the data quickly in time for it to be relevant; processing the data to yield digestible and focused insights; and ensuring rapid and broad access to the insights.

The need to gather data quickly by definition eliminates many of the stalwart data-capture techniques. You need results in weeks, not months. Processing the data is crucial. A massive data dump, even if gathered quickly, is not helpful because you can't find the most relevant conclusions. Broad access is equally important: even if gathered quickly and digested to insights, if decision makers can't get quick access, then once again they're not very helpful. Think of a fire engine that races to a burning building but then no one can find the hoses.

Blend of missions

To make the discussion more real, we'll focus on one of the most dynamic industries: automotive. Not only is technology there evolving exceptionally quickly, there's also a blend of technology missions working, ideally, in tandem (safety, infotainment, navigation, etc.) and a blend of inputs (driver voice, physical touch controls, cameras, exterior sensing, etc.). We're already seeing the evolution from hardware to software, offline to connected and static to real-time. And eventually drivers will become riders thanks to autonomous vehicles.

Human factors analysis is more than just about satisfaction and ease of use. It's also often about safety, particularly for vehicles. With drivers being bombarded with technology, it's like being in a room with 10 people talking to you at once. And that can lead to distraction. You say something to your car like "Call Helen" and your vehicle replies by charting a course to Helena, Montana. (Don't laugh, we've seen such things in real-world driving research.)

The problem is that such an interaction can cause drivers to take their eyes off the road as they look at the screen. That's a distraction, which can lead to trouble. In fact, a recent Pulse Labs review of National Highway Traffic Safety Administration complaints over the past 30 months found that 5% mention NAV or SCREEN.

Helping spur this bombardment of drivers is the automotive industry's increasing reliance on other industries to power the customer cabin experience. First it was computers, then voice assistants and very, very soon the gaming industry. Case in point: Epic Games is partnering with Volvo to design Volvo driver interfaces.[1] Another fitting example of the lack of benchmarks: there are few, if any, studies on the success of gaming interfaces in real-world vehicle environments.

Which brings us back to how technology can be applied to help get more "human" into human factors analyses. How can traditional research such as surveys and focus groups keep pace? How might you ask in a survey how a customer feels about a specific set of menu steps in an interface or how responsive an infotainment system is to your voice's commands? Or with gaming (since those interfaces are coming to cars), to what extent could you rely on a survey to capture a glitch accurately and completely in a gaming console? Or a game console in a car? Those are the two key words – accurately and completely – that HMI-related insights require to be useful.

Not that surveys don't have their place. They do, including for things like choice modeling and willingness to pay.

Paint a picture

One solution is using cameras to capture how people and technology interact. And that video needs to include voice and user annotations of what they were feeling and what would help make things better. Visual, audio and customer feedback together can paint a picture that yields unrivaled insights. The need for accuracy and completeness is where this multimodal approach to HMI comes into play. As a picture is worth 1,000 words, ergo a video is worth 1,000 surveys.

Camera-centric research also speeds decision-making for one particularly important reason: with traditional flat research, the findings are often subject to interpretation. For example, if a survey respondent reports that an infotainment interface was "difficult to use," whoever is processing that information will have to interpret what that means and what actions should be taken. And with research compression at hand, we can't afford one of those actions to be "do more research."

With video and voice, you can see and hear the driver struggling or being delighted. You can hear what they're trying to do and how the system responds. You can see the tactics drivers employ to make the technology work for them. And you can see when the system works against them (e.g., Helena, Montana). All that means that the time needed to interpret results is reduced to the time it takes to watch the video.

Well, almost. Remember our tenets above. The data need to be captured quickly. And for that our firm uses portable in-car cameras. It's the useful insights where traditional video-centric research often falls short. That's typically because crude video research is just sticking a camera in a car and waiting for something interesting to happen. So as a customer of the research, you get a terabyte file of video data and you're left to find the needle in a haystack.

Or worse, it's not even real drivers in real vehicles. It's employees of the brand in question doing a cursory check of things. The fox guarding the henhouse, as it were. Or it's streams of video selfies with no structure to the data or ways to ensure quality and representativeness.

It's here where the model used for survey research is useful. You don't send a respondent and blank piece of paper and instruct, "Write down everything you know about Topic X." Instead, you send specific questions to pre-categorize the results and make them more actionable. And a brand doesn't survey its own employees.

We work with our clients to identify key business needs or questions, then focus our video-capture around those needs. That pre-categorizes the results, which is designed to increase actionability. We do the work under natural conditions with real drivers in real cars under real situations. Those data are then AI-processed to further focus the insights.

The bottom line is that nobody wants a bad interface. No brand wants a bad customer experience. No consumer wants a frustrating relationship with technology. I've been involved in research innovation for decades and been stunned by the overall lack of speed.

Today, better and faster research technology can compensate for research compression and help close the HMI knowledge gap, when abiding by the three tenets of speed, focused insights and fast and easy access. Now it's up to the combination of brands and researchers to evolve as fast as technology and consumer expectations have.

Lincoln Merrihew is global head, brand and marketing at Pulse Labs. He can be reached at lincoln.merrihew@pulselabs.ai.

REFERENCES

1 https://www.media.volvocars.com/global/en-gb/media/pressreleases/301605/volvo-cars-and-epic-games-bring-real-time-photorealistic-visualisation-inside-next-generation-volvo

TMRE THE MARKET RESEARCH EVENT

November 14-16, 2022
JW Marriott Hill Country
San Antonio, TX

CONNECTING INSIGHTS TO BUSINESS GROWTH

TMRE IS MORE THAN AN IN-PERSON EVENT.

IT'S A BUSINESS ACCELERATOR.

That's why TMRE scours the world each year to bring you a superstar keynote roster.

CONTROL YOUR SUCCESS

EMMITT SMITH
NFL Hall of Famer, 3x Super Bowl Champion & newest **NASCAR** Co-Owner

RISE TO OUR POTENTIAL

STEPHAN GANS
Chief Insights & Analytics Officer, **PepsiCo.**

INSIDE ONE OF THE MOST POWERFUL HUMAN EMOTIONS

SUSAN CAIN
NYT Best-Selling Author of Quiet & Author of **Bittersweet**
Named the 6th Top Influencer in the World by LinkedIn

Quirks Subscribers Save 15% with VIP Code QUIRKSAD

••• generations research

Keeping up with the Zoomers

How brands can capture the interest of Generation Z

| By Joeri Van den Bergh

snapshot

Tips on connecting with a young cohort that came of age during a financial crisis, a pandemic and the threat of world war.

Generation Z – aka post-Millennials, the iGeneration or Zoomers – is the world's largest generational cohort, accounting for one third of the global population. Unaware of a life without Google, this digitally native generation is social media-literate, always-on and hyper-informed. Online platforms are their means to be in the know, to stay connected and to amplify their voice. With many coming of age during the pandemic, the past two years put a mark on their lives and their outlook on the future.

Having the fastest-growing disposable income, which is expected to reach $33 trillion over the next decade, Gen Z is an important audience for any brand. So, what characterizes these Zoomers and what are their expectations towards brands?

This article highlights some key insights from our Ready for the Zoomers? report, based on a survey with 1,072 U.S. consumers (Gen Z, Gen Y, Gen X and Baby Boomers). The report is available free (registration required) at: www.insites-consulting.com/reports.

Gen Z and finance

Growing up in the aftermath of the 2008 financial crisis and against the backdrop of the COVID-19 recession, Gen Z wants to write its own money rules. Like their Millennial counterparts, who are still leading the way with their drive for entrepreneurship (64%), 51% would like to start their own business. Yet unlike Millennials, they are driven by passion rather than achievement. While 52% of Gen Y say a job defines how successful you are, this is only true for 32% of Gen Z. Flirting with TikTok and YouTube algorithms, this generation turns its social game into a business plan in no time.

Gen Z is the first generation with an incredibly high level of financial literacy at a very young age. Fifty-three percent state that their interest in financial planning and/or investments has increased in the last two years. Rather than enrolling in expensive business courses,

they self-educate online by following influencers (aka fin-fluencers) on social media for financial advice, for example. Even if their disposable income is not (yet) reaching the heights of that of Millennials, they are closing in on their older counterparts when it comes to financial investments: 62% of Gen Z made investments in the past year.

While more traditional products like stocks and education funds take the biggest share in their investment portfolio, Gen Z sees a lot of potential in art and new investment products such as cryptocurrencies and NFTs. In fact, 25% of Gen Z believe NFTs will increasingly replace physical artwork and 41% would even like to be paid or get an allowance in cryptocurrencies.

What this can mean for brands: Gen Z expects brands to support them in building financial resilience by providing accessible and actionable advice. Copper is a debit card and banking app for teens that helps them to set goals, learn about budgeting and save for the future. At the same time, parents can monitor purchases in real time, through the app.

Gen Z and mental well-being

We all experience a certain degree of stress, yet Gen Z is atop the chart for most stressed-out generation. In the U.S., 55% of Gen Z feel stressed, their main stress factors being mental health (60%) and studies/job (45%). Yet, this "It's ok to not be ok" generation does not shy away from talking about their struggles. Gen Z is all about dropping taboos and raising awareness for mental health.

While social media is a space for Gen Z to connect, be creative and relax, it is often cited as a contributing factor to their mental health struggles. Comparing themselves to others (34%) and external expectations (16%) add to the stress equation. The unrealistic depictions and filtered images put a lot of pressure on looks for this generation (67%), with only 46% feeling comfortable to show their real, unfiltered self online.

What this can mean for brands: Gen Z's focus on mental well-being can inspire brands to take on the role of life coach, supporting youngsters in prioritizing their mental health and encouraging discussions around the topic. For Mental Health Awareness Month 2021 and in collaboration with The Jet Foundation, Victoria Secret's PINK launched Make Your Move Fest, a program full of tips on ways movement, expressions, connection and self-care can help us feel our best. As part of its Beauty Unaltered campaign, CVS Pharmacy implements a special mark for any unaltered image, because images are powerful and, the thinking goes, using unaltered images can lead to a powerful change. CVS is asking its partners to join the movement, hoping to encourage realism in beauty marketing. Building on last year's #ReverseSelfie campaign, Dove launched the #DetoxYourFeed campaign in April 2022 to demonstrate the harm created by toxic beauty advice on social media. The campaign is part of Dove's Self-Esteem Project, aiming to tackle low self-esteem caused by idealized beauty content.

Gen Z and the metaverse

Seamlessly blending physical and digital worlds, Gen Z are true digital natives. For this "always-on" generation, social media plays a central role in their everyday lives; 34% even feel anxious if they (must) disconnect for a day.

While this visual- and video-driven generation turns to YouTube for entertainment and tutorials, TikTok provides a creative outlet for memes and viral content. Together with Instagram, the latter is also used for digital activism. Just think about how the Black Lives Matter hashtag – which originated in 2013 after the fatal shooting of Trayvon Martin – engaged a worldwide audience online after the video of George Floyd's killing went viral in 2020.

Compared to older generations, Gen Z has a more positive image of social media companies. While 55% feel these companies have too much power, this rises to 73% for Gen Y, 66% for Gen X and even up to 76% for Baby Boomers. Yet, Gen Z is not naïve when it comes to protecting their privacy, with half of them distrusting how their data is used and one

third using encrypted messaging apps like Signal, Threema and Telegram, etc.

Next to the more traditional social media platforms, Gen Z is fully exploring the metaverse, from Fortnite to Animal Crossing to Minecraft and Roblox. Hanging out with friends in virtual worlds, creating an avatar and spending money on virtual outfits is nothing extraordinary to them. No generation will embrace and shape the metaverse more than Gen Z, which is where they also expect brands to be.

What this can mean for brands: Generation Z expects brands to play a relevant role in both their online and offline realities. Cereal company OffLimits launched 2,500 custom cereal box NFTs. The NFT owners are invited to collaboratively design and mint a one-of-a-kind cereal box NFT – both in the metaverse and in real life. In fact, all verified NFT owners will obtain four real-life packing containers of the ultimate cereal NFT.

Gen Z and inclusivity

Like Millennials, Gen Z believes brands should play an active part in shaping a more sustainable and inclusive future and expects them to communicate about their efforts.

Thirty-eight percent believe that brands that don't communicate about sustainability are not sustainable, showing this generation's call for radical transparency. With the internet at their fingertips, Gen Z are pro fact-checkers and they do not shy away from rejecting brands that don't align with their views. In fact, 34% refuse to buy non-sustainable brands.

The global issues that keep Gen Z up at night are related to social inequalities. Being the most ethnically diverse generation in history, diversity and inclusion are key to them. Consequently, more than any other generation, Gen Z considers racism (48%) and LGBTQIA+ rights (18%) as top issues to tackle at global level. Striving for gender liberation, Gen Z values brands that acknowledge gender diversity and break gender stereotypes. In May 2021, Instagram launched a feature allowing users to add up to four pronouns to their profile from dozens of available options, including he, she, they, ze, ve, etc. Users can even submit a request for pronouns not yet included in the list.

Forty-three percent of Gen Z want brands to challenge societal issues. This focus on social justice is also reflected in their spending behavior, with 69% being willing to pay more for brands that treat employees and suppliers fairly. Moreover, 42% are willing to pay more for brands that are Black-owned and 41% for female-owned brands.

What this can mean for brands: Gen Z not only expects brands to take a stand on societal issues but also to help educate them on how to support minority groups and communities. Google makes it easier than ever for these generations to find Black- and female-owned businesses by adding badges that represent Black-owned and women-led businesses. U.S. retailer Target made a commitment to invest over $2 billion in Black-owned brands by 2025, by featuring Black-owned brands and offering mentorship to Black designers. Since Target started investing more in Black-owned brands, sales increased significantly.

Need for guidance

Gen Z is a very important generation that will bring about change in society, not only because they want to but because they have the skills to do so. They are much more vocal than their predecessors but they are also vulnerable and are growing up in difficult times. They have an enormous need for guidance, especially from brands.

No matter what you call this generational cohort, they are the largest in size and their disposable income is expected to outperform that of any generation. Your business's future is likely to depend on them. Are you ready for the Zoomers?

Joeri Van den Bergh is cofounder of InSites Consulting. He can be reached at joeri@insites-consulting.com.

Marketing research information when and where you want it.

QUIRK'S
MEDIA

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

••• environmental research

Creating agents of change

How companies and organizations can overcome 'infowhelm' and motivate action for the planet

| By Rachel Dreyfus and Anna Price

snapshot

Americans are increasingly concerned about climate change, particularly young adults, BIPOC communities and liberal-leaning voters.[1-4] Informed by more than 30 publicly available research reports, the following post-COVID-19 research roundup of Americans' beliefs, eco-friendly behaviors and perceived climate change solutions is a snapshot of a topic with fast-changing perceptions. We also examine the psychology behind Americans' climate change perceptions and behaviors with a focus on how companies and non-profit organizations might leverage this information to not only enhance their mission and brand but also enable Americans to fulfill their vision for a healthier planet.

For the purposes of this article, climate change is "a long-term change in the average weather patterns that have come to define Earth's local, regional and global climates."[32] Changes are driven by human activity (e.g., burning fossil fuels) and are observed through a number of indicators, such as ice lost at Earth's poles, rising sea levels, increases in frequency and severity of extreme weather, biodiversity loss and more.

That climate change is on the collective mind and nerves is not disputed – beyond activists, government and the news media, pop culture now reflects concern around the issue. Artistic works as disparate as the 2021 Netflix movie "Don't Look Up," comedian Bo Burnham's "That Funny Feeling" (with more than 6.2 million YouTube views) and 2019's off-Broadway play "Hooked on Happiness" have attempted to tackle the topic. Reflecting care and desire for change, these examples represent a growing form of infotainment designed to break through to those who aren't paying attention.

But how can NGOs, industry and government rally the public towards active personal and collective behaviors? How can society overcome the paralysis caused by "infowhelm" and denial? As with most complex challenges, one size does not fit all. We will present a simplified continuum of concern for climate change and hypothesize how brands can show

support while appealing to consumers across the continuum. We'll also discuss how brands can rally the public to action, both personal and collective, regardless of level of concern or political ideology.

Significant increase

Recent studies suggest that approximately six in 10 Americans are concerned about climate change.[1,5-6] This is a significant increase from the 44% of Americans who were concerned about climate change in 2009. And, corroborating this trend, in Yale University's segmentation of climate attitudes where "six Americas" were identified and ranked by their level of concern, the most highly-concerned segment (Alarmed) has increased in proportion from 18% in 2017 to 33% in 2021.[5]

There are, however, variations in climate change attitudes by age, race and ideology. These variations are described in the following sections.

- Studies show that younger generations (i.e., Gen Z and Millennials) are particularly concerned about climate change[2,6] and feel personally responsible to stop climate change from getting worse.[8] Over half of 15-39-year-olds worry about climate change regularly, with 39% worrying about it every week. One-fifth of adults 20-39 worry about climate change daily.[9] When comparing perceptions across generations, 37% of Gen Zers and 33% of Millennials say addressing climate change is a top personal concern for them while only 27% of Gen Xers and 29% of Boomers say the same.[10]
- Studies consistently find greater concern for climate change among Democrats and liberal-leaning voters compared to Republicans and conservative-leaning voters.[1,6,11] Within the Republican party, younger Republicans are more concerned about climate change, looking more similar to their liberal counterparts.[11] A recent survey conducted by Pew Research Center showed that most Gen Z (57%) and Millennial (59%) Republicans say large businesses and corporations are doing too little to help reduce the effects of climate change versus 50% of Gen X and 43% of Baby Boomer Republicans.[11] As such, age is a better predictor than political leanings with regard to climate attitudes.
- Studies indicate that concern about climate change is greater within BIPOC communities than non-Hispanic white communities. Among U.S. Hispanics, 81% say addressing global climate change is either a top concern or one of several important concerns to them personally; this is compared to 67% of non-Hispanics.[15] Environmental inequities occur in BIPOC versus white communities. For example, when compared to white adults, Black and Hispanic adults are more likely to say that their community has big problems with garbage, waste and landfills, air and water pollution, drinking water safety and a lack of green space and parks.[16] Greater concern among BIPOC communities could be due to lived experiences.

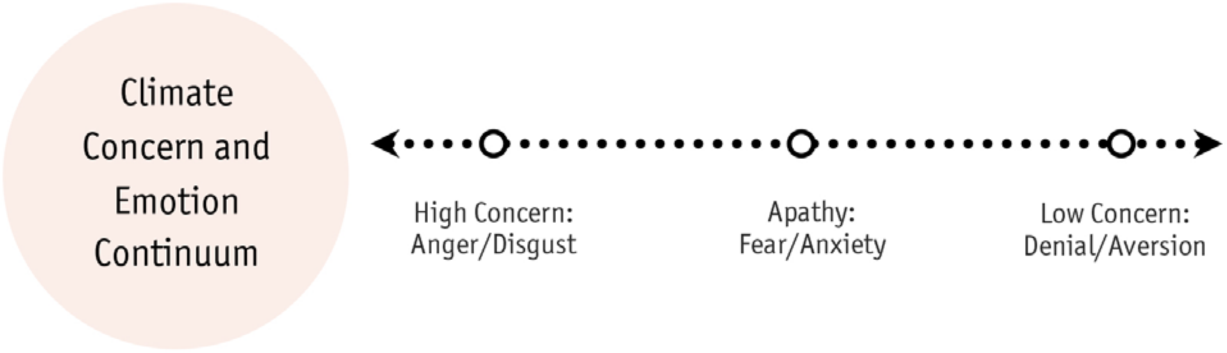
Motivate them to action

We must better understand levels of concern and importantly, the variety of emotions evoked, which in turn will either motivate action, create apathy or raise barriers to engagement. The remainder of this article will address what consumers believe should be done and how to motivate them to action.

Recent attention has been drawn to anxiety related to the climate crisis and the threat of environmental disaster. Symptoms of climate anxiety include panic attacks, insomnia and obsessive thinking, irritability, sadness, depression, helplessness, hopelessness, guilt, frustration or anger and feeling scared or uncertain.[3,12] Research studies and national polls indicate that climate anxiety is particularly prevalent among youth and young adults,[12,13] indigenous peoples,[12] and those who care most about environmental issues.[12,13]

Climate content on social channels adds to the already distressing nature of the medium,

Figure 1


Climate Concern and Emotion Continuum
High Concern: Anger/Disgust
Apathy: Fear/Anxiety
Low Concern: Denial/Aversion

particularly younger generations who report a range of intense emotions about what they see. (Figure 1 illustrates a continuum of emotional responses to climate change.) A recent poll by Pew Research showed that among social media users, the majority of Gen Z (69%) and Millennial (59%) social media users felt anxious about the future the most recent time they saw climate change content online. Fewer than half of Gen X (46%) and Baby Boomer (41%) social media users reported the same.[2] Two-thirds of adults engaged with climate content on social media (67%) said it made them feel angry about insufficient action to address climate change.[10] Almost half of Gen Z (49%) and Millennial (45%) social media users felt angry that not enough is being done to address climate change the last time they saw climate change content online.[6] No brand wants to make Millennials and Generation Z angry!

Yet, research suggests that eco-anger is associated with engagement in collective, pro-climate behaviors whereas eco-anxiety is associated with lower engagement and paralysis.[14] Perhaps, then, evoking anger isn't a bad thing; however, it should be accompanied by solutions and ways to make a change.

Feasible solutions

Several studies have examined Americans' beliefs about acceptable and feasible solutions to slow or mitigate climate change.

With regard to willingness to change personal behavior, three-quarters of Americans are willing to make a lot or some changes in their lifestyles to deal with climate change.[18] Again results show younger Americans are more likely than older Americans to express concern about their personal impact on climate change.[19]

One-third of Americans say they have rewarded companies that are taking steps to reduce global warming by buying their products and 43% say that they intend to reward these companies in the next 12 months. Conversely, 28% of Americans say they have punished companies that are opposing steps to reduce global warming by not buying the products.[20]

Among Gen Z and Millennials, 73% report doing whatever they can to live sustainably on a daily basis. In fact, 37% have changed the products they buy, 27% have changed the way they shop and 26% have changed the amount of products they buy.[9]

Brands have a responsibility

Americans also express expectations that brands/organizations have a responsibility to contribute to climate change mitigation, with half of Americans saying that companies should be doing "more" or "much more" to address global warming.[20] Examples of expected actions by companies include: not advertising their products and services on television networks that spread misinformation about climate change (75%) and purchasing 100% clean, renewable energy to power their operations (70%).

Younger generations express this sentiment more often than older generations. In fact, Gen Z and Millennials report climate change as one of the top social causes with which they would like to see brands involved.[9] The majority of Gen Z and Millennial consumers agree with the statement "Corporations (e.g., companies, brands) should take more responsibility for fighting climate change." Younger consumers expect eco-friendly products, packaging and practices and reusable products from brands.[21] Top eco-shopping behaviors of these consumers include purchasing secondhand clothing, sustainably-sourced food, beverage, home products and personal care product. Eco-conscious brands like Grove Collaborative and Lush cosmetics are disrupting their categories by providing direct-to-consumer and in-store substitutes to traditional top brands lacking in sustainability commitments.

Encourage and motivate

How can we encourage and motivate more people to act? Over half (56%) of Americans report talking about climate change "at least sometimes." A smaller proportion have donated money to an organization focused on addressing climate change (16%), contacted an elected official to urge them to act on climate change (10%), volunteered for an activity that was focused on addressing climate change

(10%) or attended a protest or rally to show support for addressing climate change (6%) in the past year.[9] Gen Z and Millennials are more likely than Gen X and Baby Boomers to take at least one of these actions.[9]

Positive images of climate change capture attention. Findings from a number of research studies show that positive images of climate change solutions (e.g., solar panels) are perceived more favorably[23,24] and are more attention-grabbing[25] than negative images of climate change causes or effects (e.g., hurricane damage, smokestacks). These findings might be explained by behavioral theory,[26] which indicates that people sometimes avoid fear-based communication and messages if they feel there is no feasible solution to the perceived threat or feel unable to take personal action to reduce the perceived threat. As such, positive images of climate change solutions are more likely to capture attention and motivate engagement/action and overcome denial and avoidance.

Use the right messengers. Americans feel more interested in addressing climate change when calls for climate change action come from younger adults (42%) or people like them (39%).[10] Half of Hispanic Americans have also reported being more interested in addressing climate change when urged by younger adults.[15] On the other hand, Americans report that their views about climate change are not influenced by religious leaders or political leaders in either party.[6]

When surveyed, 21% of social media users say they follow an account that focuses on addressing climate change, 21% have liked or commented on a post about addressing climate change and 12% have shared a climate change post with others (net 31% have engaged with any of those three).[2]

Here's where emotions count. People who feel overloaded with doomsday information might feel hopeless and turn away. Brands and NGOs that use a positive tone, providing inspiration, imagination/solutions and desire for a future worth the effort will likely attract more social media followers.

Social influence from family and friends can impact attitudes. Social consensus, or level of agreement in one's social group about an issue, can have a significant impact on climate change beliefs, attitudes and policy preferences for people across the spectrum of political ideologies, but especially among conservatives.[27] For example, researchers in North Carolina found that parents' concerns about climate change increased when their children communicated climate change education they had learned at school. This effect was particularly strong among conservative parents who had the lowest levels of climate change concern before the intervention.[28]

The impact of social influence can partially be explained by social identity theory, which states that people derive portions of their self-concept through interactions with the social groups they belong to.[29] In a recent survey, only 26% of U.S. adults reported that a friend or family member had encouraged them to get more involved in efforts to address climate change.[10] Brands and NGOs can motivate action by providing and promoting oppor-

The power of Quirk's in the palm of your hand
Download the free Quirk's mobile app
GET IT ON Google Play
Download on the App Store
QUIRK'S MEDIA

Figure 2

Brand Communication Strategies to Motivate Consumers Worried About Climate Change

Positive tone: Provide inspiration, appreciation and imagination for a future worth the effort

Make it easy: Identify feasible, small changes people can make to overcome avoidance and guilt

Make it relevant: Benefit to local community makes it personal and more likely to break through

The right messenger: People will believe messages from someone they trust (e.g., family members, children, friends, celebrities)

Appeal to values: Gain bipartisan support through shared values (e.g., economic health, moral responsibility, beauty)

Offer community volunteerism: Provide identity-building opportunities that offer recreation and social gathering while making a difference

tunities for peer group activities to strengthen consumer identity in caring for the Earth.

Linking climate change to core values may influence perceptions. A study by Goldberg and colleagues[30] found that an advertising campaign using conservative spokespersons and linking climate change to conservative values (e.g., faith, national security) increased Republicans' understanding of the existence, causes and harms of climate change. Further, a study by Sparkman and colleagues demonstrated that reflecting on how one's eco-behaviors are linked to core values can improve people's support for climate change policies.[31] This is important as mitigating climate change will require both individual and policy-level action. To advance a unifying goal to care for the Earth, brands should consider appealing to common values like being stewards or guardians of the Earth in messages to gain support for Earth-friendly initiatives or at least segment their messaging with a values-based sensibility.

Help us better understand

It's clear from this review of more than 30 research reports that Americans are increasingly concerned about climate change, particularly young adults and BIPOC communities. Measurement of both levels of concern and emotions evoked will help us better understand how their behaviors are likely to change.

The elevated concern for the health of the planet has transferred to values and beliefs. Most consumers feel that changes are important, in the form of both personal lifestyle behaviors and brands demonstrating responsibility for climate change solutions.

With an understanding of the emotional nuances around climate change, brands can create purpose-driven communications and enable Americans to fulfill their vision for a healthier planet that aligns with their values. Figure 2 lists ideas for communications tactics to motivate consumers across the spectrum of concern unearthed in the research. Examples of brands that illustrate these tactics include Patagonia, Grove Collaborative, Avocado Mattress, Sephora "clean beauty" and TOMS and Allbirds footwear. These and other brands that advocate for the planet and communicate in motivating ways stand to benefit. They will be the growth leaders, as they gain market share and disrupt category leaders that continue doing business as usual.

Rachel Dreyfus is president of Dreyfus Advisors. She can be reached at rachel@dreyfusadvisorsllc.com. Anna Price is research analyst at Dreyfus Advisors. She can be reached at anna@dreyfusadvisorsllc.com.

REFERENCES

1 Kennedy, B. "U.S. concern about climate change is rising, but mainly among Democrats." 2020. https://www.pewresearch.org/fact-tank/2020/04/16/u-s-concern-about-climate-change-is-rising-but-mainly-among-democrats/. Accessed April 1, 2022.

2 Tyson, A., Kennedy, B., Funk, C. "Gen Z, Millennials stand out for climate change activism, social media engagement with issue." 2021. https://www.pewresearch.org/science/2021/05/26/gen-z-millennials-stand-out-for-climate-change-activism-social-media-engagement-with-issue/ Accessed March 31, 2022.

3 Castelloe, M. "Coming to terms with eco-anxiety." Psychology Today. 2018. https://www.psychologytoday.com/us/blog/the-me-in-we/201801/coming-terms-ecoanxiety. Accessed April 1, 2022.

4 Buckley, C. "'OK Doomer' and the climate advocates who say it's not too late." New York Times. March 3, 2022.

5 Leiserowitz, A., Maibach, E., Rosenthal, S., et al. "Global warming's Six Americas." September 2021. https://climatecommunication.yale.edu/publications/global-warmings-six- americas-september-2021/. Accessed March 28, 2022.

6 AP-NORC Center for Public Affairs Research. "Where do Americans stand on climate and energy policy?" 2021. https://apnorc.org/projects/where-do-americans-stand-on- climate-and-energy-policy/. Accessed April 1, 2022.

7 Kennedy, B. "Most Americans say climate change affects their local community, including 70% living near coast." 2020. https://www.

pewresearch.org/fact-tank/2020/06/29/most-americans-say-climate-change-impacts-their-community-but-effects-vary-by-region-2/ Accessed March 29, 2022.

8 YPulse. Sustainability Report. 2022. https://www.ypulse.com/report/2022/03/09/sustainability-report-2/. Accessed March 31, 2022.

9 YPulse. "Five stats brands should know about young consumers and climate change." 2021. https://www.ypulse.com/article/2021/03/23/5-stats-brands-should-know-about-young-consumers-climate-change/. Accessed March 29, 2022.

10 Tyson, A., Kennedy, B., Funk, C. "Gen Z, Millennials stand out for climate change activism, social media engagement with issue." 2021. https://www.pewresearch.org/science/2021/05/26/climate-engagement-and-activism/. Accessed March 30, 2022.

11 Tyson, A. "On climate change, Republicans are open to some policy approaches, even as they assign the issue low priority." 2020. https://www.pewresearch.org/fact-tank/2020/10/06/how-important-is-climate-change-to-voters-in-the-2020-election/. Accessed April 3, 2022.

12 Coffey, Y., Bhullar, N., Durkin, J., Islam, S., Usher, K. "Understanding eco-anxiety: a systematic scoping review of current literature and identified knowledge gaps." The Journal of Climate Change and Health. 2021;3.

13 Clayton, S., Karazsia, B. "Development and validation of a measure of climate change anxiety." Journal of Environmental Psychology. 2020;69.

14 Stanley, S., Hogg, T., Leviston, Z., Walker, I. "From anger to action: differential impacts of eco-anxiety, eco-depression and eco-anger on climate action and well-being." Journal of Climate Change and Health. 2021;1. https://doi.org/10.1016/j.joclim.2021.100003.

15 Mora, L., Lopez, M. "Most U.S. Latinos say global climate change and other environmental issues impact their local communities." 2021. https://www.pewresearch.org/fact- tank/2021/10/04/most-u-s-latinos-say-global-climate-change-and-other-environmental-issues-impact-their-local-communities/. Accessed April 1, 2022.

16 Funk, C. "Key findings: How Americans' attitudes about climate change differ by generation, party and other factors." 2021. https://www.pewresearch.org/fact-tank/2021/05/26/key-findings-how-americans-attitudes-about-climate-change-differ-by-generation-party-and-other-factors/ Accessed March 30, 2022.

17 Ray, S. "A field guide to climate anxiety." Oakland, Calif.; University of California Press; 2020.

18 Poushter, J., Fagan, M., Huang, C. "Americans are less concerned – but more divided – on climate change than people elsewhere." 2021. https://www.pewresearch.org/fact- tank/2021/09/14/americans-are-less-concerned-but-more-divided-on-climate-change-than-people-elsewhere/. Accessed April 4, 2022.

19 Bell, J., Poushter, J., Fagan, M., Huang, C. "In response to climate change, citizens in advanced economies are willing to alter how they live and work." 2021. https://www.pewresearch.org/global/2021/09/14/in-response-to-climate-change-citizens-in-advanced-economies-are-willing-to-alter-how-they-live-and-work/. Accessed March 3, 2022.

20 Leiserowitz, A., Maibach, E., Rosenthal, S., et al. "Consumer activism on global warming, September 2021" Yale University and George Mason University.

21 YPulse. "How brands can help the environment, according to Gen Z & Millennials." 2022. https://www.ypulse.com/article/2022/03/23/how-brands-can-help-the-environment-according-to-gen-z-millennials/ Accessed March 30, 2022.

22 YPulse. "Here are the eco-friendly products Gen Z & Millennials are most likely to buy." 2021. https://www.ypulse.com/article/2021/03/03/here-are-the-eco-friendly-products-gen-z-millennials-are-most-likely-to-buy/ Accessed March 30, 2022.

23 Chapman, D., Corner, A., Webster, R., Markowitz, E. "Climate visuals: A mixed methods investigation of public perceptions of climate images in three countries." Global Environmental Change. 2016;41:172-182.

24 Lehman, B., Thompson, J., Davis, S., Carlson, J. "Affective images of climate change." Frontiers in Psychology. 2019;10.

25 Carlson, J., Kaull, H., Steinhauer, M., Zigarac, A., Cammarata, J. "Paying attention to climate change: Positive images of climate change solutions capture attention." Journal Of Environmental Psychology. 2020;71.

26 Witte, K., Allen, M. "A meta-analysis of fear appeals: Implications for effective public health campaigns." American Journal of Health Behavior. 2000;27(5):591-615.

27 Goldberg, M., van der Linden, S., Leiserowitz, A., Maibach, E. "Perceived social consensus can reduce ideological biases on climate change." Environment and Behavior. 202;52(5):495-517.

28 Lawson, D., Stevenson, K., Peterson, M., Carrier, S., Strnad, R., Seekamp, E. "Children can foster climate change concern among their parents." Nature Climate Change. 2019;9:458-462.

29 Hogg, M., Reid, S. "Social identity, self-categorization and the communication of group norms." Communication Theory. 2006;16:17-30.

30 Goldberg, M.H., Gustafson, A., Rosenthal, S.A., Leiserowitz, A. "Shifting Republican views on climate change through targeted advertising. Nature Climate Change. 2021;11: 573-577.

31 Sparkman, G., Attari, S., Weber, E. "Moderating spillover: Focusing on personal sustainable behavior rarely hinders and can boost climate policy support." Energy Research & Social Science. 2021;78.

32 NASA. "Overview: Weather, global warming and climate change." 2021; https://climate.nasa.gov/resources/global-warming-vs-climate- change/#:~:text=Climate%20change%20is%20a%20long,are%20synonymous%20with%20the%20term. Accessed April 7, 2022.

iPad
Android
Kindle
An app for every platform
QUIRK'S
Marketing Research Review

••• special advertising section

7 TOP ATTITUDE AND USAGE RESEARCH COMPANIES

Attitude and usage research can help you better understand your target audience. It is important to learn how, when and where products are used as well as how consumers feel about your offerings.

Forming a stronger relationship with consumers can lead to better predictions of their current and future needs and wants. These seven companies conduct studies that will help you better gauge consumer product usage, attitudes and behaviors.

Decision Analyst

Founded 1978 | 150 employees
Bonnie Janzen, EVP
Felicia Rogers, EVP

Decision Analyst is a recognized leader in awareness, trial and usage (ATU) studies. Our staff operates in North America, Europe, Latin America and Asia, and we have conducted thousands of ATU studies on durable goods, non-durable goods and services over the past four decades. Our researchers meld in-depth qualitative investigations, strategic survey research, advanced analytics, mathematical modeling and simulation to solve complex marketing and strategy issues. Decision Analyst

also specializes in tracking research, product testing, advertising research, strategy research, branding optimization, virtual shelf sets and package testing, brand-name research and pricing studies. We focus on consumer packaged goods, pharmaceuticals, medical devices, online retailing and traditional retail, technology, food service and restaurants, financial services and the automotive industry. Our researchers can recommend the quantitative or qualitative technique best suited to your research needs.

Phone 1-817-640-6166
https://www.decisionanalyst.com/services/awarenesstrialusage/

Evaluative Criteria, Inc.

Founded 1973 | 20 Employees
Jason Steeg, President
Patty Bien, Executive Vice President

Evaluative Criteria Inc. (ECI) is a full-service research partner staffed by senior engagement partners steeped in category and competitive knowledge focused on understanding your short- and long-term business objectives. We utilize collaborative thought leadership and a highly communicative partnership to develop an inventive research design that provides insights necessary for driving decisions. Staffed by experts in specific business sectors as well as research design practice areas, we provide clients with a best-in-class experience and deliver strategic insights for innovation, brand and marketing teams. ECI's capabilities include executing research both in-person and online and range from small to large engagements. ECI is a CRG Global company.

Phone 1-914-631-1019
http://www.eci-research.com

Fieldwork

Founded 1980 | 250+ employees
Steve Raebel, President

Our specialties include B2B, consumer and global research. For over 40 years Fieldwork has recruited the highest-quality business, medical and consumer respondents both through and far beyond databases, using proven methods to reach your audience. We believe in a customized approach to recruitment. Fieldwork provides unsurpassed project management, hosting and complete guidance through in-person, remote/online and hybrid research sessions. Our technically versed support staff will confidently guide you through the logistics from large online to multicountry project execution. Fieldwork is your qualitative research partner. Focus on the research. We'll do the rest.

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

Ironwood Insights Group, LLC

Founded 2017 | 300 employees
Brian Cash, VP Research Services

Ironwood Insights offers expert-level consultation and execution across a full-spectrum of insights services, including forward-thinking designs, industry-leading data collection services and leading-edge analytical frameworks. Ironwood's strategic approach to attitude and usage research focuses on uncovering and monitoring the key dynamics that impact markets and drive product usage over time. Our emphasis is on helping clients stay ahead of buyer behaviors and product usage habits, competitive activity and brand attitudes that will drive consideration, purchase and loyalty. We balance proven methodological rigor with a flexible approach to informational content to ensure that your market and product strategies are optimized, now and in the future. Contact us to learn more about how Ironwood provides clients with actionable, durable business insights that create a lasting competitive advantage.

Phone 1-602-661-0807 x2110
E-mail info@ironwoodinsights.com
www.ironwoodinsights.com

……

Mindspot Research

Founded 2006 | 10 Employees
Jeanne Campbell, Managing Director

Mindspot designs attitude and usage marketing research (A&Us) to capture and quantify attitudes, perceptions and beliefs. Mindspot will help you understand actual product usage, frequency and where your product or service is positioned in relationship to the competitor's products or services. Mindspot collects consumer opinions on products, companies or ideas and uncovers what services and products customers use, purchase and patronize. The team at Mindspot are known for specializing in A&Us for both business-to-business and consumers and obtaining the most reliable foresights, insights and results.

Phone 1-407-730-4603
www.mindspot.com

……

OvationMR

Founded 2017 | 20+ Employees
Jim Whaley, CEO

OVATIONMR
DISCOVER WHY
LEARN HOW
OVATIONMR.COM

It's a great day for discovering why… you get fast, reliable answers for insightful decisions with OvationMR. Significantly improve your online research success with dependable survey data from B2B and consumer audiences. Our mission: Expand opportunities for researchers to do the work you believe in and can stand behind, for your company, your community and your cause. OvationMR services cover sampling, programming and hosting, translations and design and analysis for brand tracking studies, market segmentations, conjoint analysis, awareness and usage studies, customer experience, concept testing and political polling. Our clients include research practitioners, consultants, governments, NGOs and global brands. We offer survey audience sampling and supporting research services globally. Contact us today at: info@ovationmr.com.

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

……

Toluna

Founded 2000 | 1,700 employees
Frédéric-Charles Petit, CEO

Toluna delivers real-time insights at the speed of the on-demand economy. By combining global scale and local expertise with innovative technology and award-winning research design, we help clients explore tomorrow, now. Toluna Start is the intelligent insights platform that helps you instantly answer your business questions. With a single log-in, you can conduct quantitative and qualitative research – either through automated and self-service solutions or custom research programs built with the help of research and service experts – and reach respondents from our panel of over 40 million consumers in 70+ markets. With every research capability at your fingertips and vetted respondents at the ready, Toluna Start helps you get the insights you need, the moment you need them.

Phone 1-203-834-8585
https://www.tolunacorporate.com

……

Help is here.

Free statistical calculator from QUIRK'S Marketing Research Media

- Chi-square test
- One-sample t-test between percents
- Independent samples t-test between means
- Determine sample size for percents
- Fisher's exact test
- Two-sample t-test between percents
- Confidence interval around a mean
- Determine sample size for means
- Binomial test
- Confidence intervals around a percent
- Compare sample mean to population mean
- Sampling error for a given sample size
- Poisson events test
- Compare two standard deviations
- Compare three or more means
- And more

www.quirks.com/resources/calculator.aspx

THE Q REPORT

CORPORATE **RESEARCHER** REPORT 2022

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

QUIRK'S
MEDIA

WELCOME TO THE NINTH ANNUAL QUIRK'S Q REPORT!

With the pandemic (hopefully!) behind us, for this year's survey of Quirk's readers we circled back to a topic we had looked at in 2017: tools and methods – their effectiveness; how they are chosen; and what factors influence their adoption.

In addition, we delved into department staff levels, years on the job, skill sets and job satisfaction and also asked about: the biggest MR-related change they foresaw their organization making in the coming year; the effectiveness of traditional and newer techniques; how they stay up to date on methods and techniques; and areas of frustration with marketing research.

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

The Q Report work life and salary and compensation study of end-client/corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research subscribers of Quirk's. The survey was fielded from June 22 to July 18, 2022. In total we received 1,799 usable qualified responses of which 677 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.28 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

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

We also want to thank our content partners for sharing their industry insights. InnovateMR tackles data quality and cyberfraud. GLG explores value-based pricing. Forsta outlines the philosophy that will shape the future of research. And Brandwatch highlights researchers' biggest challenges.

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

Sincerely,

Joseph Rydholm
Editor
joe@quirks.com

THANKS TO OUR CONTENT PARTNERS FOR SHARING THEIR INDUSTRY INSIGHTS:

InnovateMR tackles data quality and cyberfraud.
GLG explores value-based pricing.
Forsta outlines the philosophy that will shape the future of research.
Brandwatch highlights researchers' biggest challenges.

CONTENTS

62 OF QUAL AND QUALITY

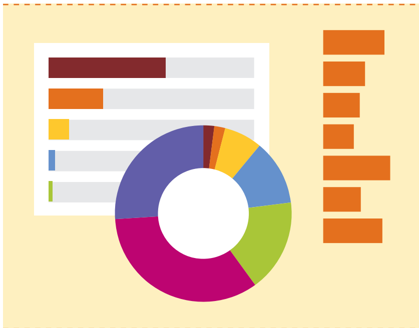
Ninth annual Q Report finds abiding faith in qualitative methods and growing worry about data quality threats, reestablishing relevance

By Joseph Rydholm, Editor >> Quirk's Media

LINKEDIN AND CLIENT-SIDE RESEARCHERS 70

Are end-client researchers using LinkedIn?

By Emily C. Koenig, Digital Editor >> Quirk's Media



73 RESEARCHERS PRIORITIZE FLEXIBILITY, JOB SATISFACTION

By Marlen Ramirez, Assistant News & Content Editor >> Quirk's Media

INDUSTRY INSIGHTS

64 Let's get real: There is no silver bullet for cyberfraud — innovateMR

67 Getting value-based pricing is difficult, but worth it — GLG

68 Winning strategies for research agencies: Connecting research and human experience — Forsta

70 The biggest obstacles for market researchers – and how to overcome them — Brandwatch

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

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

Follow us on Twitter @QuirksMR.

QUIRK'S MEDIA

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

Publisher
Steve Quirk
steve@quirks.com | x202

Editor
Joseph Rydholm
joe@quirks.com | x204

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

Assistant News & Content Editor
Marlen Ramirez
marlen@quirks.com | x212

OF QUAL AND QUALITY

Ninth annual Q Report finds abiding faith in qualitative methods and growing worry about data quality threats, reestablishing relevance

By Joseph Rydholm >> Quirk's Media

Qualitative research often gets a bad rap. It's old-fashioned, it's too basic, it's not projectable, the detractors say. While there is some truth to each of those criticisms, qual has endured for decades and, if the results of our ninth annual Q Report survey are any indication, it looks set to do so for many more.

Similar to the 2017 Q Report, a focus of this year's survey was tools and methods – their effectiveness; how they are chosen; what factors influence their adoption – and while tech-driven quant approaches acquitted themselves well, mobile qualitative notched noticeable increases in the percentages of respondents labeling them as effective or very effective compared to 2017.

(The data is remarkably consistent across the five-year span; percentages for most other tools and techniques were within a few points of each other. Traditional in-person focus groups held their own, earning a slight increase in the percentage of effective or very effective, from 83% in 2017 to 86% in 2022.)

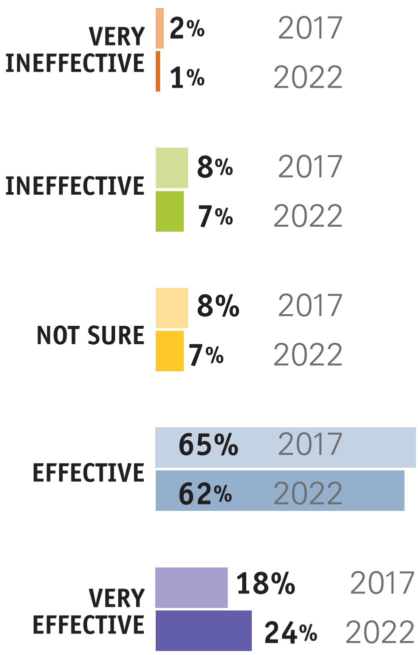
In 2017, a combined 67% said online qualitative/focus groups were effective or very effective. For 2022, that number rose to a combined 83%.

In 2017, combined 44% said mobile qualitative was effective or very effective. For 2022, that number rose to a combined 58%.

We didn't delve into the reasons for these assessments but it's likely that many 2022 respondents viewed the digital qual methods as lifesavers during the pandemic, perhaps turning to them out of necessity but obviously pleased with their efficacy and utility – especially against the backdrop of concern some respondents expressed this year over panel data, which can be tainted by fake respondents and other bad actors. To be sure, people can lie their way into focus groups and fail to give truthful answers during them but qual's in-person nature definitely has a leg up on panel research's black-box anonymity for those worried about who's answering their research questions.

Along with delving into department staff levels, years on the job, skill sets and job satisfaction (see accompanying content for a deeper dive on those findings), we asked about: the biggest MR-related change they foresaw their organization making in the coming year; the effectiveness of traditional and newer techniques; how they stay up to date on methods and techniques; and areas of frustration with marketing research.

How effective do you think traditional focus groups are at providing quality data and insight?



Predictability and stability

Innovation is certainly critical in any industry – marketing research is no different – but for as much as MR industry observers, vendors and VC-backed startups scream about the need for innovation, our study finds that researchers and their internal clients place much more value on predictability and stability when it comes to picking and using MR methods. And while new doesn't necessarily equal scary, it does introduce an uncomfortable level of uncertainty when huge business decisions are being made, respondents told us.

> *If we can try new methods in a cost-controlled environment, that is preferable. We also need to make sure the new methods are going to allow us to meet business needs (i.e., getting the clarity of responses we need, adequate numbers of responses, credible data, respondents in the right demographics), so we vet them that way, too.*
>
> *I consider what business and research questions we are trying to solve and consider new approaches as one of the options to address these. The importance and visibility of the objectives often dictate whether or not I feel we can take the risk of trying something new.*

On top of or in addition to that, even if a tool or method seems to have great promise there need to be other forms of proof – a case study, a recommendation from a friend or peer, etc. – in order to make the leap.

> *I keep an eye out for new and proven research and analysis techniques via refereed professional journals, data science books and by maintaining close connections with academics in marketing, behavioral science and computer science. (Vendors are generally my least-reliable sources.)*
>
> *I look at the evolution of the methodology. I'm interested in learning what its original purpose was and how much it was altered in time. In general I appreciate robust methodologies with a precise purpose, not multipurpose. No matter how innovative the methodology, I do not believe in one size fits all. I find it more effective to work with more tools/methodologies that complement each other.*

Caution is the watchword

Also similar to 2017, we asked respondents to characterize their organizations' tendencies when it comes to adopting new methods and the 2022 numbers are nearly identical. Caution still appears to be the watchword here, with 45% saying they are among the late majority and 16% placing themselves in the slow-to-adopt camp. These findings line up with years of observations from the various open-ends that indicate experimenting with new approaches for the sake of it doesn't fly with readers' internal audiences, many of whom are happy to rely on traditional methods they view as safe and dependable.

Beyond internal resistance, B2B researcher readers cited respondents themselves as an impediment to change:

> *Our research must be conducted among a very small B2B target market. The average age of the ultimate customer is mid-50s and many in the target market resist new technologies.*

> *Our [main] industry is B2B medical professionals, so adoption of new tech is slower among our primary target.*

Those working in heavily regulated industries are also often limited in their ability to easily switch to new approaches.

Cost, of course, is the No. 1 consideration and barrier to trying new tools, followed by a host of other factors: internal comfort with familiar methods; the chicken-or-the-egg problem of new tools' lack of a track record (if nobody tries them, how can they prove their value?); and the horrors of procurement.

> *In part, we don't think about these new techniques as much. In addition, it's harder for our internal clients to agree to a new methodology given the uncertainty of the outcome; having never used it before, it's unproven to them.*
>
> *They're so far behind in general market research adoption that even the most basic approaches are new to them. It's a matter of getting them used to even the idea of research before jumping into the latest & greatest approaches.*
>
> *I feel somewhat slowed down by connecting business needs with trustworthy outputs (and sometimes with new suppliers) and the fast pace my partners expect.*
>
> *If I'm given full latitude to bring on my own vendors, I'm an early adopter. If the business wants to approve, everything slows down.*
>
> *I wouldn't want to rely on something new and unproven to make important business decisions. If something is proven to work, then I'd consider using new methods.*
>
> *Limited by our horribly restrictive approved supplier list. There is internal marketing and insights support for innovation but trying new suppliers is a nightmare with contracts.*

Another impediment, apparently, is old white guys.

> *Budget restrictions and old white guys making the budget decisions.*
>
> *Number of decision makers from a certain era.*
>
> *Old people leaving the company and new people coming in helps a lot. The*

SPONSORED CONTENT

LET'S GET REAL: THERE IS NO SILVER BULLET FOR CYBERFRAUD

By Lisa Wilding-Brown
Chief Executive Officer, InnovateMR

Data quality is and will always be at the top of researchers' minds in the insights industry. How in today's ever-evolving climate can you trust that your data is reliable? Even though this issue has grown and changed over time, it remains fundamentally the same: There will always be fraudsters looking to cash in on survey incentives.

There isn't a silver bullet for cyberfraud and there is no way for any one company to completely solve this issue. I've spent the lion's share of my career studying fraudsters, understanding their motives and tactics and building solutions to be more proactive in catching these nefarious users. I'm deeply passionate about this topic and I strongly believe it is time for our industry to have a major wake-up call.

In my testing over the years, I've seen sample providers large and small deal with this problem. It isn't a matter of if, but when you will encounter an issue with sample quality. According to Accenture, 68% of businesses today feel that their cybersecurity is at risk on multiple fronts and this is expected to rise in future years as fraudsters become increasingly sophisticated. Cybersecurity Ventures, a leading security publisher recently featured in Forbes, predicts that cyberfraud will cost $10.5 trillion globally by the end of 2025. It's a very real and material problem, not only for our industry but many others as well.

There are many resources available to fraudsters that explain how to start the process. There are videos on how to start a device farm and where to buy inexpensive phones. YouTubers have a ready-made bot that you can freely use and even upgrade to a more powerful version. There are tutorials outlining the blueprint of success for a survey screener; they know what the insights space routinely looks for. Another helps viewers leverage

> *older stakeholders just want to do what was done before and don't like taking risks – even though one of our company values is bravery.*

In lieu of full-blown pilot tests, readers cited a few useful strategies for assessing new approaches:

> *We layer new techniques into projects with core traditional elements to allow stakeholders to dip their toes into a method without putting all eggs in untested basket.*
>
> *We use low-cost trials to help gain internal adoption.*

While cost is understandably a primary influence on the choice to implement new methods, data quality, with its whopping 70% of "extremely important" votes, is clearly the main driver, with factors such as speed of deliverables, question flexibility, audience specificity and in-depth analysis of data earning high percentages of "very important" or "extremely important" assignations.

Biggest change

To this year's question about the biggest MR-related change they saw their organization making, responses largely centered around staff sizes (hoping for expansions, bracing for reductions), shifts in tool and method usage (many mentions of doing more DIY, agile and AI-powered research) and adjustments to the internal view and use of the insights function.

There were more mentions than in past years of creating in-house/proprietary panels, likely due to the kinds of concerns about data quality and panel sample they expressed in answering a later question about areas of the industry that frustrate them.

And several indicated plans to add or enhance voice of the customer initiatives.

> *We are starting (and I do say "starting" loosely) to consider merging customer feedback with operational data as part of our new voice of the customer platform we are implementing this year with a vendor.*

Some report leaning on vendors for more work since they can't find in-house people to hire; others say they are reducing their reliance on vendors and bringing more work in-house, either due to budget cut-

---

INDUSTRY INSIGHTS

residential proxies that serve to hide their true location.

Getting started in the fraud industry is incredibly easy. You can rent a virtual datacenter for $120 which will help you transform a single computer into 1,000 virtual computers with unique device features. You can rent a residential proxy service for $60 to spoof your geolocation and IP address. You can leverage the AWS QA virtual device. With nominal upfront costs of $200 or so, the return on investment is incredible. On the consumer side, a casual fraudster can make $120,000 annually with ease. For B2B research, which is a common target due the high incentive payout, a fraudster can cash in further at $180,000 annually.

Tackling these issues can be intimidating but it's important that we as researchers take our power back and get ahead of these fraud innovations. There are both tactical and strategic things you can do to better position yourself and produce higher quality results.

- **Assumptions are dangerous.** It is critical to scrutinize your data closely and work with partners who are transparent and open about the challenges facing our industry.
- **Fraudsters study our ecosystem closely and they prey on predictability.** Changing our tactics is key to keeping the fraudsters on their toes.
- **No one is impervious to fraud but there are some who are more proactive than others.** It is important to ask the tough questions and work with partners who will give you a transparent view when things go off track.
- **Recognize and accept that quality really exists at the participant level.** There are good and bad users in every source online.

There is no such thing as perfect and there is certainly no silver bullet but we can do so much better!

innovateMR

www.innovatemr.com

backs or the need for more control of project completion timelines.

> *We're planning deeper dives into our current portfolio. The last few years have been very focused on innovation and new platform growth. Now we are very focused on platform efficiency and improving/maximizing what we already have and is working!*

Leadership changes are also impacting internal research functions – mostly in a good way.

> *Executive support for organic growth (vs. acquisitive growth) is growing. As a result, we're excited to see new product management roles open up that are dedicated to identifying innovative opportunities and we're getting some really engaged champions behind marketing research initiatives. As a result, we're seeing our requests for research increasing overall vs. prior years.*
>
> *Our new CEO is placing more emphasis on voice of the customer and I expect the demand for our services to continue to build.*
>
> *We have a new CMO in our division. She is promising to help get a team of four to support insights (up from just me).*
>
> *We have had a change in leadership and they value vendors. We historically have done the majority of our research in-house and it's likely that is going to get outsourced.*

Most frustrating

Late in the survey we asked an open-end about the areas of marketing research that respondents find most frustrating and readers didn't hold back. Falling response rates and data quality in general – panel data in specific – were top of mind for many.

> *Data quality from sample vendors. We regularly refuse/return nearly 50% of all gathered data as it is rife with fraud (as evidenced by open-end responses and failing red herrings). CPI for our target audience is typically $80+ and it's just crap.*
>
> *I've encountered some really awful sample over the past year. And that scares me because what I'm doing now (very expensive B2B research) requires top-quality participants.*
>
> *Panel sample. It's horrible. We all just accept that 15-30% of the sample is complete crap and maybe, with a little diligence, we can clean out most of that and be left with 5-10% that's still crap, but we're not sure which ones.*
>
> *Sample quality has really gone downhill, despite security measures in place. I get so many questionable completes in my data. It's really sad and frustrating.*
>
> *Keeping response rates up. Moving outside of our current lists into respondent lists that are not our "core" is also difficult as it requires reviewing panels that are available through different suppliers.*

Elsewhere, annoyances generally fell under a handful of categories, including internal pain points, tools and the industry overall.

Pain points

> *Internal clients who want a project yesterday but who delay the project by months after we've hired a vendor.*
>
> *The focus on new technology and automation. The strength of MR is in people analyzing data in the context of business. What is being called AI can't do that.*
>
> *Old-school methods that my organization still insist on using (paper mail surveys!).*
>
> *The amount of research that gets done that is unnecessary. We need to be better as an industry of saying no when research isn't needed or won't answer the question.*
>
> *It's the red-headed stepchild in most CPG organizations who at the same time say, "Everything we do starts with the shopper/consumer."*

Tools

> *Robust DIY survey platforms that are mobile-first. The good platforms are laptop-first, mobile as an afterthought and we need the exact opposite.*
>
> *I hate cheap survey tools and anything that "democratizes" any part of the business. We need to remove self-service research by the untrained.*
>
> *I would love to find a really great online survey tool that allows me to do full analysis too – they all claim to but I always end up pulling data out and analyzing elsewhere.*
>
> *(1) Relying on modeling to describe/predict consumer behavior and foregoing actually talking to consumers. (2) Using NPS as the primary indicator of customer satisfaction/loyalty. (3) Effectively integrating text and voice analytics into analysis of customer perceptions (problems/opportunities).*
>
> *Online surveys are our bread and butter. But response rates are reaching a point where they will no longer be fea-*

SPONSORED CONTENT

GETTING VALUE-BASED PRICING RIGHT IS DIFFICULT, BUT WORTH IT

By Bernd Grosserohde
Director, Strategic Solutions Operations, Product and Pricing Practice Area Lead, GLG

Establishing the right price isn't easy. Value-based pricing helps you monetize a brand's true value. It requires comprehensive knowledge of what your product is worth to your customer or prospective customers.

Pricing insight is elusive

Value-based pricing should be tied to product development. Companies should develop products with a clear understanding of what customers value and what they'd pay for it. The willingness to pay, an essential – but elusive – insight.

Historical sales numbers are not helpful. They describe prices customers have previously accepted but not what they will pay later. It's also difficult to ask customers directly about price. Many will give a price below what they're willing to pay.

Insights about customers' willingness to pay are also time-stamped. Consider how the pandemic has disrupted people's willingness to pay for travel or office space, or how cloud computing has disrupted the willingness to pay for software and infrastructure. Businesses cannot trust today's value-based price to hold steady indefinitely.

It is almost always worth the effort of gaining insights into customers. But smart pricing requires more than asking about price acceptance in a survey. Pricing research should consider the customer's perspective on the perceived value of products, benefits and features throughout the entire product life cycle.

There are two methods to discern customers' willingness to pay. The first is a simple tool to understand price sensitivity in early product development. The second is more complex and extremely powerful. It's an approach for innovation and for the optimization of product and price together.

Toward effective pricing research: Van Westendorp

The first method, Van Westendorp's Price Sensitivity Meter, identifies critical price thresholds, it does not directly ask about the accepted price.

In a survey, we would introduce a product or service concept and ask, "At what price would you say that this product is cheap, so that you would doubt the quality? Or too expensive, so that you would no longer buy it?" This early insight can help to align product development and pricing from the beginning.

This method is not recommended for testing multiple concepts. If you have four ideas, you don't want to ask these questions four times in a row in the same survey. If you want to understand what constitutes added value as perceived by customers, or to optimize the price architecture for a portfolio of products, there's a better method.

Toward effective pricing research: conjoint analysis

Conjoint analysis, or discrete choice models, is popular across many industries. Many companies use the method regularly as they can see how accurately it explains and predicts the choices people make when buying products.

You can use conjoint analysis to price both products and optional features. It can determine the best feature and benefit mix in new product development. It's also great for existing products that need to be adapted to changing customer needs.

So how does it work? We break a product into parts, like a house made of Legos. In a conjoint survey, respondents would not assess bricks, roofs or doors, they would choose among houses. From these choices, we can derive the perceived value of bricks, roofs and doors. These perceived values can then create "what if" scenarios and build hypothetical new concepts and products and simulate that preference share among customers.

In the conjoint exercise, we do not ask direct questions – we ask them to make choices. They probably won't know that this is a pricing study. They are just expressing their preference. The goal is to learn how customers would choose in hypothetical situations, not to understand choice among current products.

Learning from data, as opposed to only having the data, requires a full grip of your underlying business goals. The two sides complement each other. Bringing methodology, expertise and subject matter knowledge together in an efficient way is a challenge, but it'll be well worth the effort.

Want to learn more? Visit www.glginsights.com/surveys/.

GLG

www.glginsights.com

sible. Fortunately I built an in-house panel a few years ago and they still respond well. But I can't use them for everything.

The industry

Endless new buzzwords – same challenge, just a new word to describe it.

Excel sheet-based surveys that force translators to twist sentences into pretzels to match English syntax.

As an industry we often oversell new research approaches as the next best thing to drive new business. We often do this at the expense of actually knowing the capability of the new approach and if it is stand-alone or needs to be used with more traditional approaches to get a full picture of the research. Based on the sales pitch, customers think the new approach will give them complete market clairvoyance only to be disappointed. I give you "big data." It was oversold by the industry and we do not hear it in the marketing pitches anymore (it's been renamed), but it is a great tool when the marketing firm and the customer begin the process with an actual question used to interrogate the data set.

[Marketing research] hasn't marketed itself well enough compared to UX research, design thinking, etc., which make MR seem old and staid.

It really appears that the majority of researchers in the industry (or maybe just the most vocal ones) these days automatically jump on the latest bandwagon and ignore input/data that doesn't agree with their beliefs. I think there's a lot of data being missed from regular people solely to agree with their preconceived notions and narratives. It seems like the industry has become a herd of like-minded individuals instead of people who are willing to look for answers that they may not like or agree with.

Social media becoming the go-to just because it is easy to scrape the web and quickly produce results. It's terrifying to see decisions being made at C-suite level simply by looking at

---

SPONSORED CONTENT

WINNING STRATEGIES FOR RESEARCH AGENCIES: CONNECTING RESEARCH AND HUMAN EXPERIENCE

By Mike Stevens
Founder, What Next Strategy & Planning

At Forsta, we get to see both sides of the research and experience industry. Not only do we work with hundreds of research agencies around the world, we also work with some of the world's most dynamic and forward-thinking client organizations.

Many of the world's largest companies use our technology to understand their audiences, identify opportunities and improve experiences.

This unique position has helped us see how successful innovators are bringing together the disciplines of customer experience, customer insights and market research. They overcome internal silos to pursue a holistic understanding of their most important stakeholder: the customer.

We believe this philosophy will shape the future of the research and experience industries and we have a name for it.

We call it **human experience**, or HX.

Human experience unites the capabilities, data and technologies that help companies understand the people they serve. It's underpinned by software but it's really a philosophy and a framework.

It's about creating joined-up insights about people – be they customers, colleagues, patients, citizens or any other group.

These *whole-person* insights come from connecting qualitative and quantitative research, integrating behavioral data with feedback and working across market research, user research, customer experience and employee experience teams.

> *social media. But because it is quick it becomes the go-to, irrespective of who the sample truly is.*

Back to work

We didn't ask any questions about it, but it was rather surprising to not find a single mention of COVID-19 or its impacts and aftermaths across the many responses readers gave us. And while it would probably be inaccurate to say the industry is over the pandemic, the comments this year have a "getting back to work" feel. Researchers are concerned about response rates and data quality – two core issues with a direct impact on what they do and the value they provide for their organizations. They seem satisfied with the tools that are available to them, especially the proven ones like traditional and digital qualitative, but, perennially understaffed and underfunded, are always on the lookout for ways to do more with less.

METHODOLOGY

The Q Report work life and salary and compensation study of end-client/corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research subscribers of Quirk's. The survey was fielded from June 22 to July 18, 2022. In total we received 1,799 usable qualified responses of which 677 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.28 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

INDUSTRY INSIGHTS

Many research agencies already do this and are capitalizing on the movement to HX. The benefits they see include:

- **Better-quality insights** for their clients that combine different signals and methods.
- **Agency growth** from new customers beyond the traditional market research or consumer insights department.
- **New revenue streams** with income from continuous monitoring, behavioral data or strategic workshops – not only primary research.
- **Higher revenue growth** from new HX categories: CX management, for example, is forecast to grow at 18% annually between 2021 and 2026[1] – vs. 3% for established market research.[2]

This "shift to HX" manifests itself in several ways, such as adding experience management to research capabilities or designing insights projects that seamlessly connect quantitative and qualitative perspectives.

Dublin-based agency W5, for example, measures business customer satisfaction with voice, mobile and data services for eir Large Business using customer effort (CE) and Net Promoter Score. This program helped to deliver reduced churn, improved revenue and significant long-run cost reductions.

Elsewhere in the world, Brazilian research consultancy Albar Research wanted to understand the roots of childhood obesity across Latin America. They combined online surveys and smartphone diaries to collect rich insights from parents and children across the region.

There are many more examples like this on the Forsta website, where you can read stories of agencies building human experience capabilities around a core of market research.

More winning strategies for market research agencies

Read more about Forsta's take on the coming golden age for research agencies and the key strategies being implemented in our full white paper.

References
1 Customer Experience Management Market – Growth, Trends & Forecasts (2021–2026), Mordor Intelligence
2 Evolution of the Data, Analytics & Insights Industry: a forecast to 2023, ESOMAR

Forsta

www.forsta.com/winning-research-agency-strategies-connecting-research-human-experience/

LINKEDIN AND CLIENT-SIDE RESEARCHERS

By Emily C. Koenig >> Quirk's Media

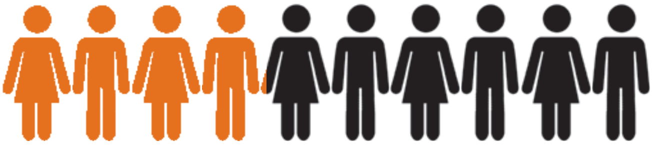
As members of a fast-paced industry, marketing research and insights professionals across the globe recognize the importance of tracking trends and keeping up with the latest techniques, but the way they go about it changes with time.

In our continued quest to better understand where researchers are turning for information, Quirk's again asked end-client researchers, "Which of the following do you utilize to stay up to date on research methodologies and techniques? (Select all that apply)."

According to Statista, 16.2% of LinkedIn's 185+ million U.S. users log on to LinkedIn daily (2021). LinkedIn itself has published that "46% of social traffic to your company site comes from LinkedIn."

So, in addition to our usual lineup of options for staying up to date, we decided to add "read and participate in LinkedIn posts" to our survey.

41% of respondents indicated that they read and participate in LinkedIn posts



Corporate researchers and social media

Are end-client researchers using LinkedIn?

It turns out that the majority of Quirk's respondents do not turn to it as a resource for staying up to date on methods and techniques. Forty-one percent of respondents selected "read and participate in LinkedIn

---

SPONSORED CONTENT

THE BIGGEST OBSTACLES FOR MARKET RESEARCHERS – AND HOW TO OVERCOME THEM

By Emily Smith
Marketing Content Specialist, Brandwatch

Market research can be time-consuming, expensive and hard to implement correctly. Brandwatch has researched the toughest obstacles for insights teams and in this article we'll offer effective solutions to help your business get ahead of the competition.

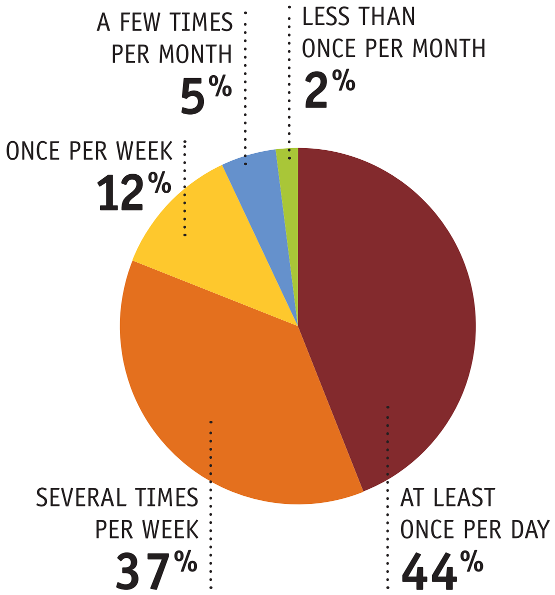
The biggest obstacles for market researchers

For our latest report on market research, we asked businesses what posts," and of those, 44% say they visit the site at least once per day – meaning 18% of end-client respondents turn to LinkedIn daily.

In the comments section, one respondent shared their personal frustration with the platform:

> *Can't use LinkedIn anymore because it's nothing but salespeople pitching me.*

Of the 41% who use LinkedIn…
On average how often do you visit LinkedIn?



While we weren't necessarily surprised by the data – personal experience already led us to believe the platform was not heavily frequented by client siders – we thought it might be useful to pause and take a peek at LinkedIn's general user demographics and compare them to our own to better understand our findings.

LinkedIn boasts a well-educated user base, with roughly half of all adults who have a bachelor's or advanced degree reporting they use LinkedIn (Pew Research, 2021). In this aspect, Quirk's respondents fit right in, as 99% report having a bachelor's degree or higher.

But age may be a dividing factor. Nearly 60% of LinkedIn users worldwide were between the ages of 25 and 34 (Statista.com, 2022). According to our research, end-client researchers skew older as compared to suppliers, with only 14% of this year's end-client respondents selecting 34 years of age or younger.

Choosing new methodologies

So, what are the most turned-to resources for client-siders looking to try new methodologies? Today attending virtual conference or webinars is the most selected at 77%, with reading blogs or articles being selected by 70% of respondents.

> *See what's being talked about in articles.*
>
> *I get a lot of e-mail and delete most. But I will register for a webinar if something piques my interest or if I think it could be something valuable for our organization.*

was impacting their ability to get to know their customers. We surveyed 63 respondents from Brandwatch's network. Here's what they said – and how you can overcome the challenges that arose.

Not having enough time

Over half of respondents said that time was a key obstacle getting in the way of market research efforts at their organization. With most teams in the field pressed for time, important research questions that could help drive business results are being left unexplored.

An effective way to save time is to work with specialist agencies who can conduct research for you. They can offer a second opinion on areas to target while giving you regular feedback on outcomes. Alternatively, a social listening tool can do all this and more. A great tool will transform the way you conduct market research internally by providing both real-time signals for changes in your market and historic analysis to help you dive deep into trends with just a few clicks.

> *See them in action on online webinars, industry conferences or local specialized events before reaching out further.*

Looking to the future

As more young Millennials move further into their careers and take on decision-making roles within brand research teams, will we see an increase in the use of LinkedIn as a resource for staying up to date on the latest methodologies and techniques? Only time will tell. What we do know is that as the role of researchers – and social media platforms – keeps shifting, Quirk's will continue tracking the most turned-to resources.

SPONSORED CONTENT

INDUSTRY INSIGHTS

(continued from previous page)

Lack of budget

Budgeting issues can be the biggest roadblock for market researchers. Being short on the funds needed to conduct effective research might mean your findings are inaccurate, out of date or irrelevant.

Using a consumer intelligence tool can help save money for your business as they don't rely on recruiting or incentivizing research participants. Instead, you can simply access unprompted feedback from millions of online sources about your brand, products or market. As you improve understanding of your market and audience, you're able to use these insights to inform better business decisions.

Not having the right data

Working with data can be complicated and time-consuming – especially if you're not sure what to look for. Our survey participants agreed that data can help inform strategic decisions and empower businesses to become smarter and more effective in all areas. Being truly consumer-centric means continuously gathering, processing and analyzing various data sources to stay on top of shifting consumer behaviors.

Working with the right data tools takes away the complications of data management, allowing you to work with a wide breadth of data sources in one platform and make important business decisions with confidence.

Not having the right technology

Having the right solutions in place is fundamental to gathering and analyzing the data that can help your organization thrive. According to our survey, 82.54% of respondents thought that having the right social data analysis tool in place will best support consumer insights generation and sharing in 2022.

The right analysis tool can help you search millions of online mentions, segment this data in a way that's relevant to you, analyze insights and act on them to improve your business results.

Not having the skillset

The final challenge we'll highlight from our research is not having the right data skills, which can significantly impact the success of an organization. Adapting to a rapidly changing market is much easier when the right skills are explored within an organization and encouraged across teams.

Investing where there are gaps in skills or knowledge in the workforce can help you stay abreast of all the changes that will impact your organization.

Key takeaways

Understanding how to conduct time-effective, budget-friendly research is important for every business, whether you're an up-and-coming SMB or a well-established enterprise.

The right consumer intelligence tool can transform your approach to market research in rapidly changing times, enabling your organization to act with agility and confidence.

You can read about these insights in more detail in our report on The Researcher of 2022.

Brandwatch

www.brandwatch.com

RESEARCHERS PRIORITIZE FLEXIBILITY, JOB SATISFACTION

By Marlen Ramirez >> Quirk's Media

The 2022 edition of Quirk's annual Q Report offers deeper insight into client-side researchers' thoughts and opinions. Throughout the years, Quirk's has collected information to be shared and compared to see how the industry has changed.

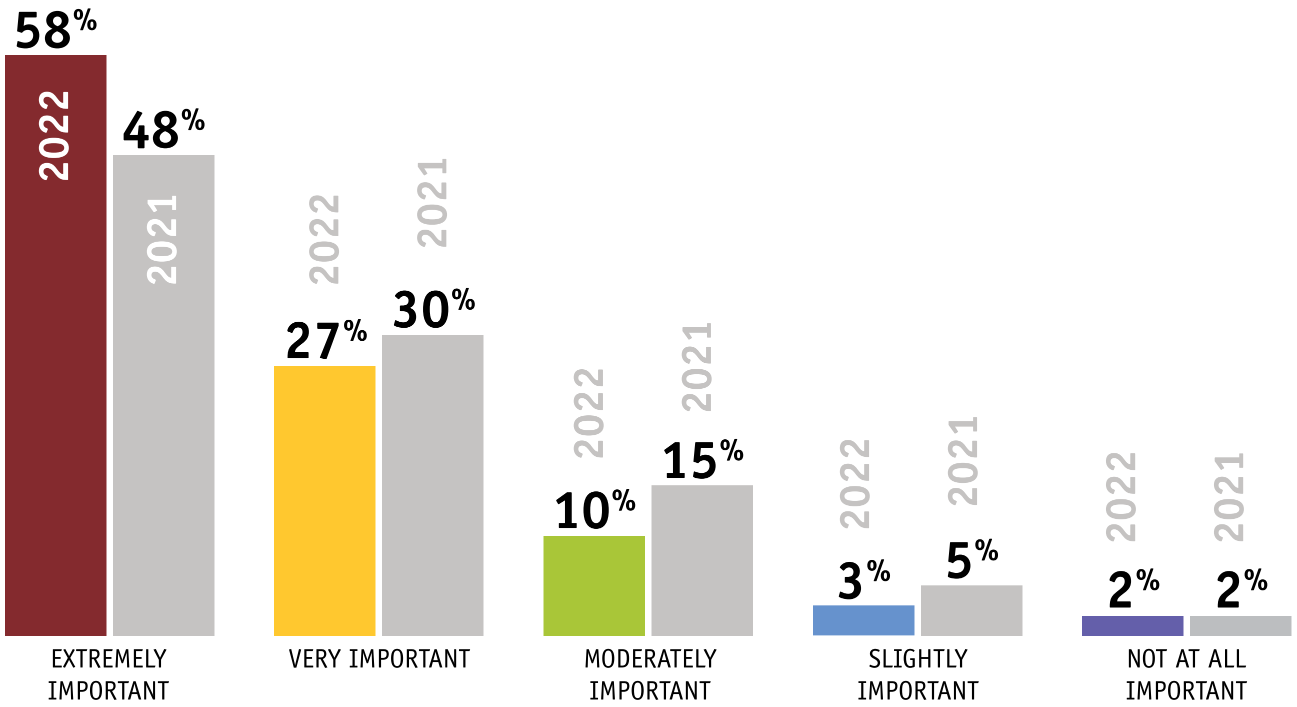
This year, respondents continued to prioritize job flexibility. Fifty-eight percent of respondents believe flexibility within an organization is extremely important, followed by 27% who believe it is very important. This is a 10% increase compared to when we first asked the question in 2021.

The Q Report received 677 usable qualified responses from full-time (defined as 35+ hours per week) client-side insights professionals. We highlight interesting pieces and comments but mostly let the data speak for itself. If you are interested in a deeper dive, visit www.quirks.com/tools/salary-survey.

MR experience

This year, when asked about marketing research experience, 59% of respondents reported having 16+ years, increasing 16% compared to our 2019 results. Interestingly, although most respondents have 16+ years of experience, 55% indicated having been at their current job between one to five years.

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



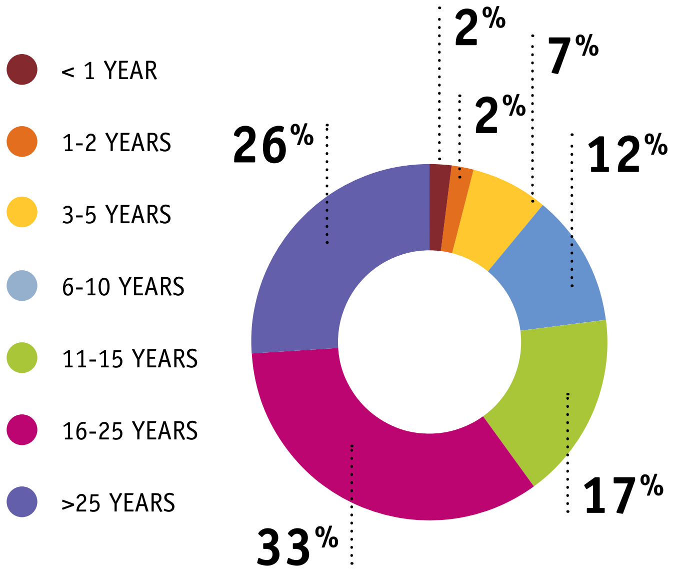
Changes in employment

The continued instability of many industries likely led 46% of respondents to indicate that it is very unlikely and unlikely that their companies will hire additional contract research employees but 49% say their companies are somewhat likely, likely or very likely to hire permanent market researchers in the next 12 months.

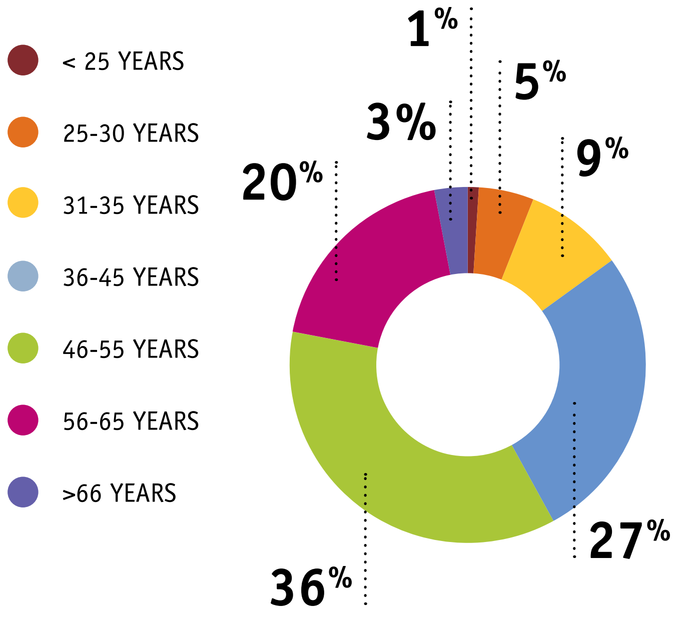
The highest percentage of employees indicated they are very unlikely to change jobs this year or are undecided. Although most respondents are not expecting to seek employment at a different company, they say their companies are searching, and struggling, to hire employees:

> *We have been trying to hire for the past six months – there is a huge deficit of people with market research skills.*
>
> *It's really hard to find quality candidates.*

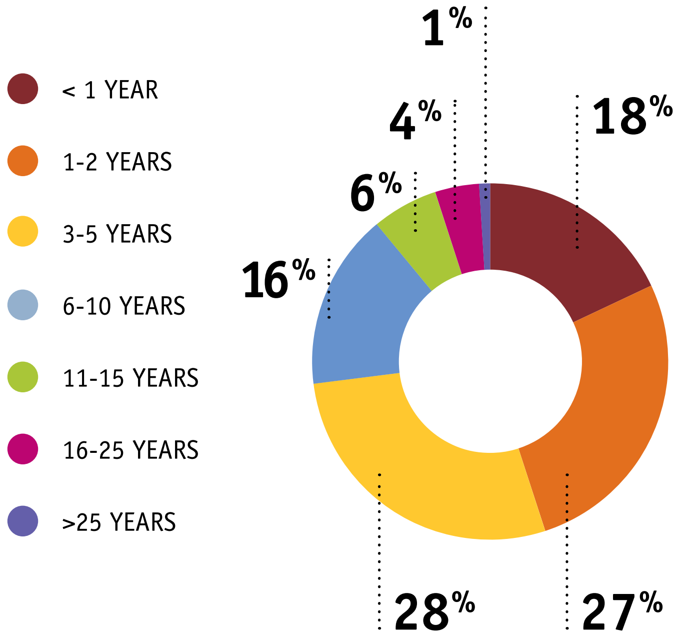
How many years of experience do you have in marketing research?



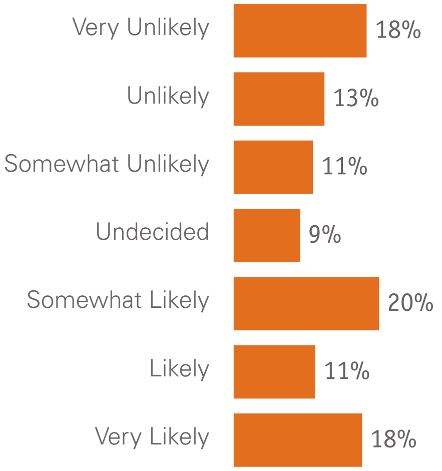
Age of survey respondents



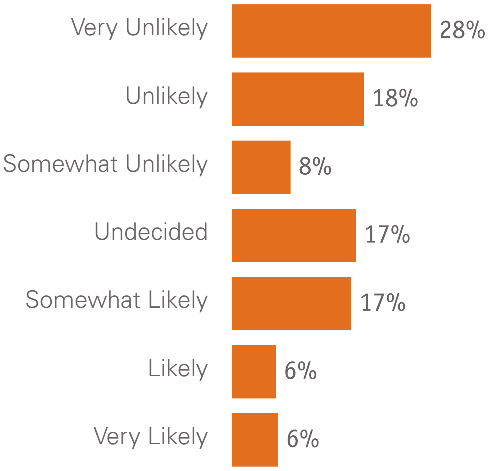
How many years have you been in your current job?



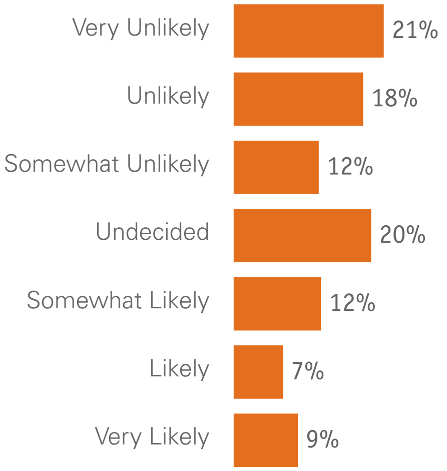
How likely is it that your company will hire additional permanent market research employees in the next 12 months?



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



How likely are you to seek employment at a different company this year?



Job satisfaction

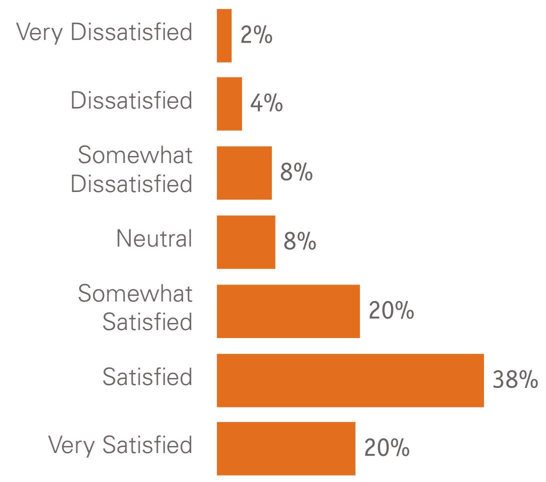
Seventy-eight percent of respondents indicated they are somewhat satisfied, satisfied and very satisfied with their roles however some shared rising concerns within their positions and companies:

> *Historically we are not a research-driven org, so I'd like to see more support here for training and development opportunities, along with additional roles for market researchers.*
>
> *Being locked into old methods because that is what the company has always done, as well as not having a budget to try new things.*
>
> *Lack of internal resources. Being a team of one means I'm asked for everything under the sun, with a deadline of ASAP, while my budget is continuously scrutinized.*
>
> *Lack of understanding by Human Resources about the critical role market research plays for the company which impedes promotions and compensation.*

Although most respondents are content with their jobs, many expect the next year to bring challenges:

> *Marketing research is new to the company. I'm the first-ever dedicated researcher. However, in the first six months of my employment, my role has gone from a focus on market research with a substantial budget to standing up a NPS survey with just enough funding to cover a new survey platform. I'd be surprised if they didn't cut research from the 2023 budget entirely.*
>
> *Conducting more qualitative using in-house resources for moderating due to budget cuts.*

How satisfied are you with your current employment?



Positive changes include expanding staff and settling into a new business structure:

> *Continuing to hire and onboard new team members. Nearly half of the department has been with the firm for less than one year.*
>
> *We recently reorganized the research dept and increased the research budget, so no big changes are expected for next year.*
>
> *Executive support for organic growth (vs. acquisitive growth) is growing. As a result, we're excited to see new product management roles open up that are dedicated to identifying innovative opportunities, and we're getting some really engaged champions behind marketing research initiatives.*
>
> *As a result, we're seeing our requests for research increasing overall vs. prior years.*
>
> *With a fully staffed team, we will produce more output and more research will be utilized across the org.*

Compensation

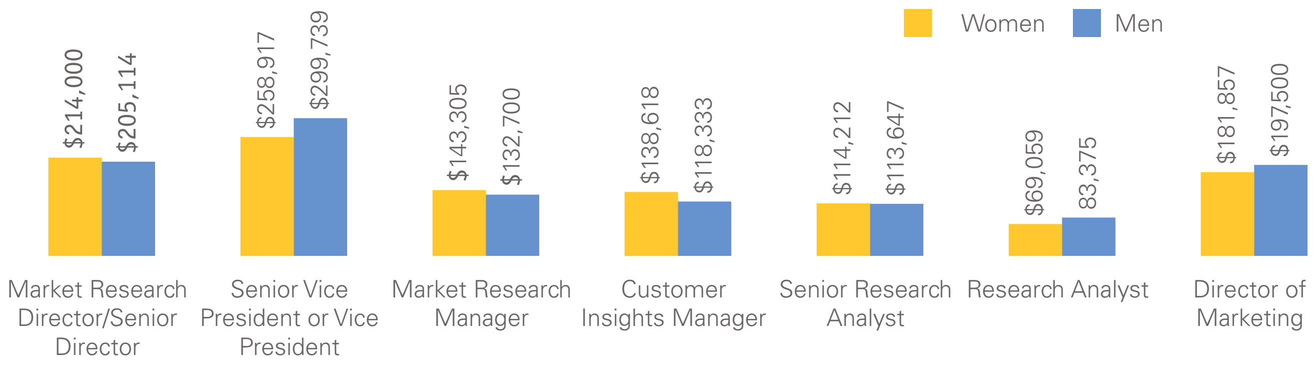
The mean salary of all job titles rose 14% since 2021. In the most-selected title, market research director/senior director, women reported making more than men.

If you are interested in seeing a breakdown of compensation for all industries and job titles, including crosstabs by gender, location, age and more, visit www.quirks.com/tools/salary-survey!

METHODOLOGY

The Q Report work life and salary and compensation study of end-client/corporate researchers is based on data gathered from an invite-only survey sent to pre-qualified marketing research subscribers of Quirk's. The survey was fielded from June 22 to July 18, 2022. In total we received 1,799 usable qualified responses of which 677 were from end-client researchers and used for this end-client report. An interval (margin error) of 2.28 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

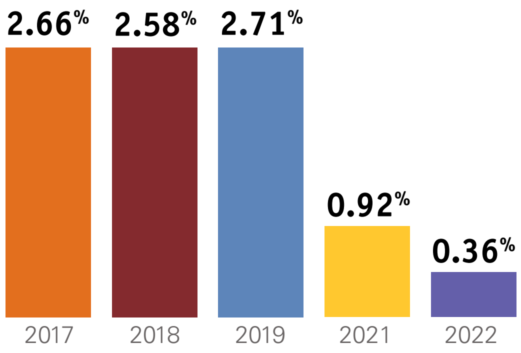
Average total compensation for women vs. men; top seven end-client/corporate researchers titles



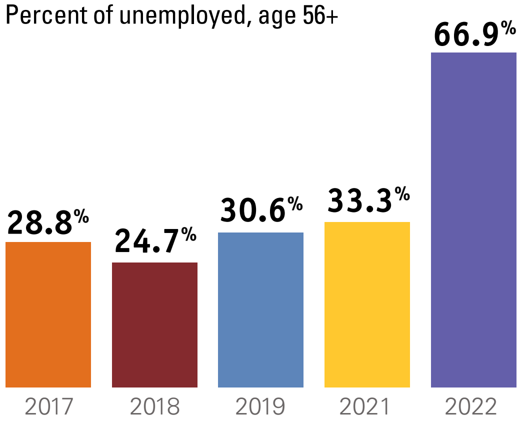
UNEMPLOYMENT IN THE MARKETING RESEARCH INDUSTRY

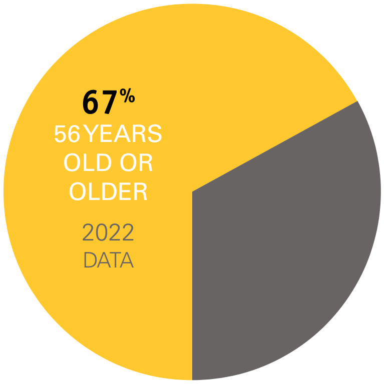
Quirk's has collected unemployment data from 2017-2022, excluding 2020 due to COVID-19. In 2022, 0.36% of respondents were unemployed, the lowest percent to date.

Percent of respondents unemployed



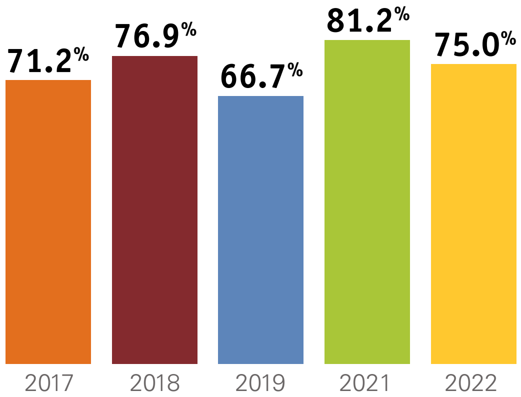
Percent of unemployed, age 56+

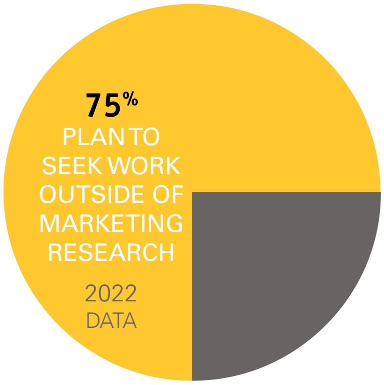




Out of those unemployed, **67% are 56+ years of age**, the highest percentage yet.

Percent of unemployed who plan to expand search outside of marketing research





Seventy-five percent of unemployed respondents **plan to seek employment outside of the market research industry**.

CALENDAR OF EVENTS

••• can’t-miss activities

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

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

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

Neuromarketing World Forum will host its annual event on **September 28-30** in **Berlin**. Visit https://www.neuromarketingworldforum.com.

The 2022 Quirk's Event – Global will be held on **October 11-13** online. Visit https://www.thequirksevent.com/virtual-global-2022/.

Thomson Reuters will hold Reuters Events: Customer Service & Experience 2022 on **October 18-19**. Visit https://events.reutersevents.com/customer-service/customer-service-new-york.

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

Succeet will host succeet22 on **October 20-21**. Visit https://www.succeet.de/en/events2022/.

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

Quirk’s Media will host Wisdom Wednesday on **December 7**. Visit www.quirks.com/events/wisdom-wednesday-webinars-december-7-20222022.

American Marketing Association will host its 2023 AMA Winter Academic Conference on **February 10-12** in **Nashville,** with virtual accommodations. Visit https://www.ama.org/events/academic/2023-ama-winter-academic-conference/.

QRCA will host its 2023 Annual Conference on **March 22-24, 2023**. Visit https://www.qrca.org/page/annual-conference.

The 2023 Quirk’s Event – Chicago will be held on **March 27-28, 2023**, at the Sheraton Grand in **Chicago**. Visit www.thequirksevent.com.

The 2023 Quirk’s Event – London will be held on **May 3-4, 2023**, at the InterContinental London O2 in **London**. Visit www.thequirksevent.com.

GIA Global Group will host its World Data Summit on **May 17-19** in **Amsterdam**. Visit https://worlddatasummit.com.

Customer Contact Week Asia 2023 will host its annual event on **June 13-16** at the Sands Expo and Convention Centre in **Singapore**. Visit https://www.customercontactweekdigital.com/events-customercontactweekasia.

The 2023 Quirk’s Event – New York will be held on **July 19-20, 2023** (tentative date), at the Javits Convention Center in **New York City**. Visit www.thequirksevent.com.

Event details as of August 1, 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.

THE QUIRK'S EVENT
FOR MARKETING RESEARCH AND INSIGHTS PROFESSIONALS

TheQuirksEvent.com

TICKET PRICES START AT
$95*
*Corporate researchers only. Other packages available.

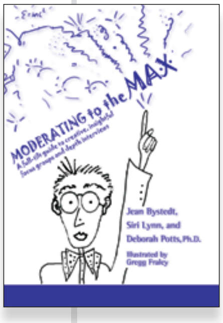
LEGACY SPONSOR 84.51°

VIRTUAL
GLOBAL

OCTOBER 11-13, 2022

A VIRTUAL EVENT DRIVING REAL-WORLD INSIGHTS

ESSENTIAL READING FOR RESEARCH PROFESSIONALS

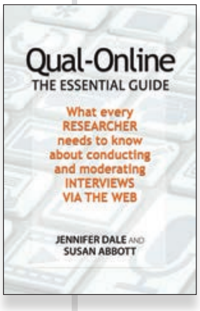

MODERATING to the MAX
A full-tilt guide to creative, insightful focus groups and depth interviews
Jean Bystedt, Siri Lynn, and Deborah Potts, Ph.D.
Illustrated by Gregg Fraley

Moderating to the Max

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

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

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

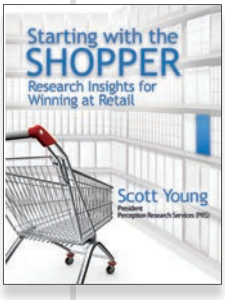

Qual-Online
THE ESSENTIAL GUIDE
What every RESEARCHER needs to know about conducting and moderating INTERVIEWS VIA THE WEB
JENNIFER DALE AND SUSAN ABBOTT

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

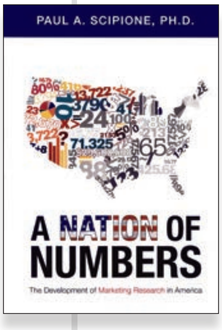

Starting with the SHOPPER
Research Insights for Winning at Retail
Scott Young

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

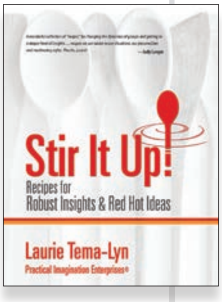

PAUL A. SCIPIONE, PH.D.
A NATION OF NUMBERS
The Development of Marketing Research in America

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

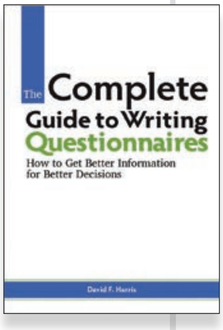

Stir It Up!
Recipes for Robust Insights & Red Hot Ideas
Laurie Tema-Lyn
Practical Imagination Enterprises

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

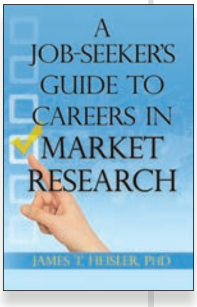

The Complete Guide to Writing Questionnaires
How to Get Better Information for Better Decisions
David F. Harris

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
JAMES T. HEISLER, PHD

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

How to Decide if a Career in Market Research is Right for You

An authoritative guide to the market research industry at the beginning of the 21st century, its size and scope, what value it provides, who works in the field, who uses it and for what decisions, the market research process, common methodologies, growth prospects for the industry, and more. The book explores market research as a career choice—skills, education, and training; how to get that first job, moving upward, potential earning power, success profiles, and stepping stones to related careers.

174 pages, 6x9, 978-1-941688-31-1 $34.95 paper

Buy direct and save!

You will always find **the best pricing** at our website,

PMP **paramountbooks.com**

Most PMP books are also available for Kindle, Nook and iPad readers.

For more information on any title listed here or to see a complete list, visit our website or call **607-275-8100.**

INDEX OF ADVERTISERS

This issue of Quirk's is made possible by our valued advertisers. Their ongoing support - along with that of the other companies and organizations that market themselves on our Web site, e-newsletter and related outlets - helps us bring you Quirk's and all of its associated resources. When you contact the organizations listed below, let them know you saw their ad in Quirk's!

Ascribe . . . . p. 7
www.goascribe.com

Brandwatch. . . . . .p. 70
www.brandwatch.com

C&C Market Research, Inc. . . . . Inside Back Cover
www.ccmarketresearch.com

Clear Seas Research . . . . .pp. 12. 13
www.clearseasresearch.com

The Collage Group . . . . p. 9
www.collagegroup.com

Curion, LLC . . . . .p. 17
www..curioninsights.com

Fieldwork Inc. . . . . Front Cover, p. 23
www.fieldwork.com

Forsta . . . . .p. 68
www.forsta.com

Gerson Lehrman Group, Inc. . . . . .p. 67
www.glginsights.com

InnovateMR, LLC. . . . . .p. 64
www.innovatemr.com

MREF. . . . . pp. 31, 37
www.MRGivesBack.org

MindField Tech. . . . . .p. 11
www.mindfieldtech.com

Paramount Market Publishing, Inc. . . . . .p. 80
www.paramountbooks.com

Quest Mindshare . . . . Back Cover
www.questmindshare.com

Quirk's Event. . . . . .p. 79
www.thequirksevent.com

Quirk's Talent . . . . .p. 41
www.QuirksTalent.com

Schlesinger Group . . . . .pp. 2, 3
www.schlesingergroup.com

Telepoll Market Research . . . . .p. 35
www.telepoll.net

TMRE 2022. . . . . .p. 45
informaconnect.com/tmre

Tremendous. . . . . .p. 25
www.tremendous.com

WebMD/Medscape Market Research. . . . . p. 5
www.medscape.com

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

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

POSTMASTER:
Please send change of address to
Quirk's Marketing Research Review
P.O. Box 22268, St. Paul, MN 55122.

© 2022 Quirk Enterprises Inc. All rights reserved.
Quirk's Marketing Research Review is not responsible for claims made in advertisements.

10 minutes with...

Elizabeth (Liz) Pfeiffer, *Director of Consumer and Product Insights, Chobani*

Jessica (Jess) Noteware, *Associate Consumer and Category Insights Manager, Chobani*

Elizabeth Pfeiffer and Jessica Noteware

> *"I've found that the most successful projects take a more hands-on approach, with decision makers heavily involved in conversations as soon as initial project scoping."*

Do you have any tips for researchers looking to improve internal communications to ensure research findings inspire corporate decision makers to take action?

Jess Noteware: The biggest advice I can offer is to promote two-way dialogue through all points of the research process. I've found that the most successful projects take a more hands-on approach, with decision makers heavily involved in conversations as soon as initial project scoping.

Liz Pfeiffer: Thinking about your different audiences and the way they best absorb information is so critical and something our team has really placed a lot of emphasis on over the past few years.

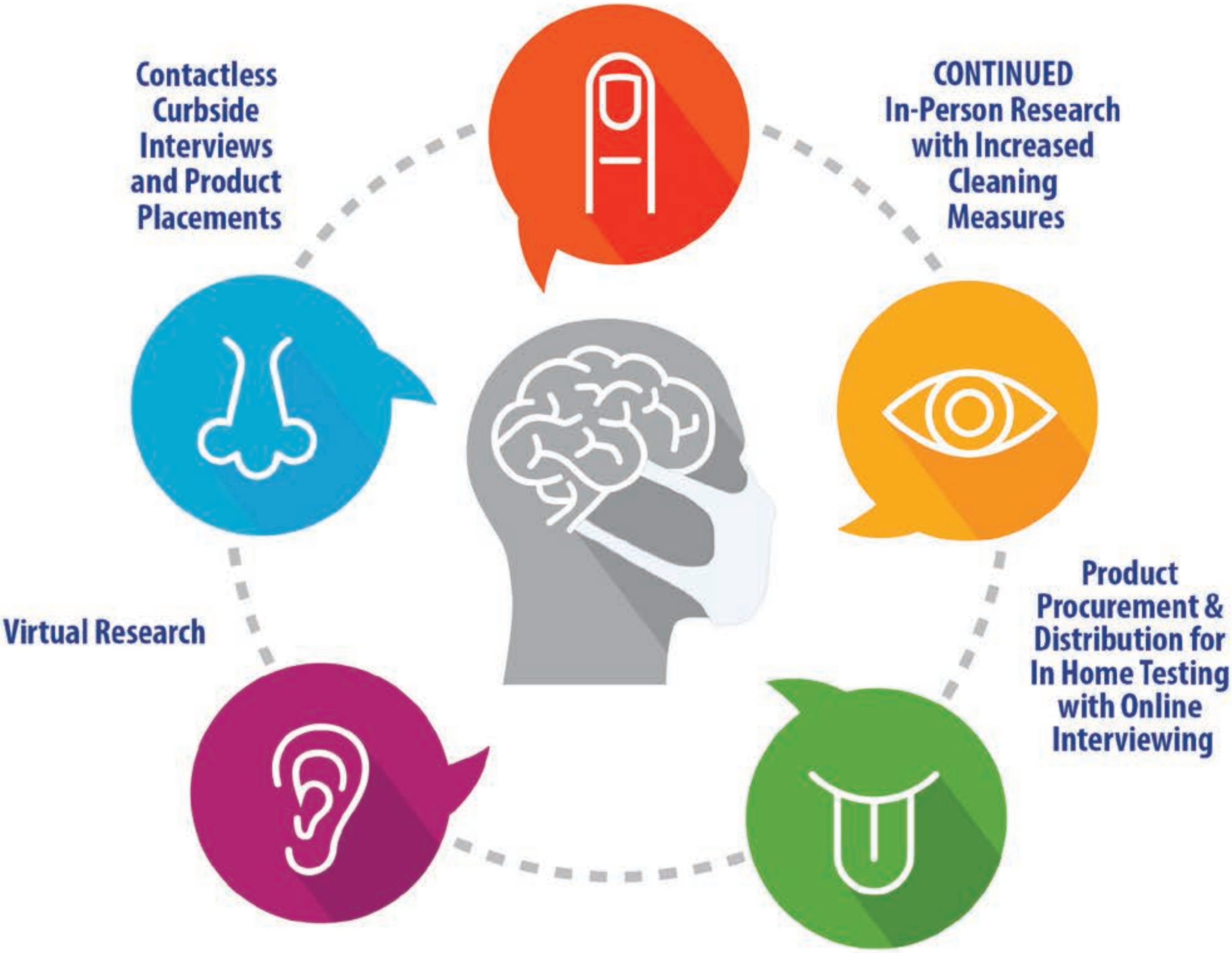
I think insights functions and researchers can often get a bad rap or really bring about a stereotype in organizations – "the nerdy data people" that are too in the weeds or only speak numbers. When I first came on board, I saw some decks that made my eyes glaze over. I worked closely with our leaders Matt Paolucci and Allison Masor to think about who our stakeholders are, from leadership and NPD to creatives, and ways the data and insights can come to life that translates to their learning and working styles.

Is your team planning on leveraging any new methodologies or techniques in the next year?

Noteware: A recent focus for our team has been layering multiple data sources onto primary quantitative research to paint a more holistic picture of results. While the list of potential resources is endless, the most impactful technique I've recently brought on board is AI trend analysis.

Pfeiffer: One focus area we have is to dig deeper into how we think about our consumers and the way we identify and talk about cohorts and platform segmentations. We're still a pretty young company in the scheme of things and traditional segmentation work costs hundreds of thousands of dollars and a lot of time to execute. Now that we're playing in spaces beyond yogurt, we also need to think about how these segments carry over to different categories and interact with one another. Is someone who prioritizes flavor and the taste experience over, say, nutritional composition in yogurt [going to do] the same in coffee creamers?

Market C&C Research



Contactless Curbside Interviews and Product Placements

CONTINUED In-Person Research with Increased Cleaning Measures

Virtual Research

Product Procurement & Distribution for In Home Testing with Online Interviewing

TASTE. TOUCH. FEEL. SMELL.

Now, more than before...

UNMATCHED SENSORY TESTING!

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

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

QUEST
MINDSHARE

Global research. Global reach.
Committed to quality sample.

- From ITDM to C Level Execs, We Own B2B
- Representative, Opted-in: Try Quest's unmatched consumer panels
- Best-in-Class Project Management and Programming Services

sales@questmindshare.com
questmindshare.com