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The value of being different in B2B

How to engage with patient communities

Insights drive SurePayroll brand revitalization

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14 Top Qualitative/ Quantitative Recruiting Companies

17 Top Global Insights Research Companies

Quirk's Marketing Research Review
November/December 2022
Volume XXXVI Number 6
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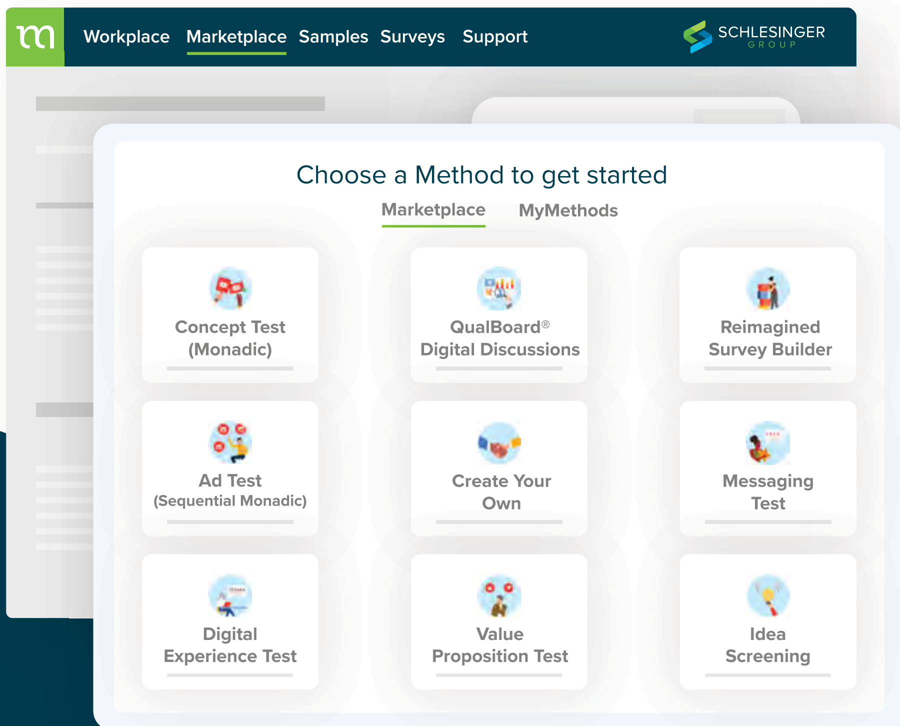

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CLICK WITH QUIRK'S ••• online, e-newsletter and blog highlights

The Quirk's Event back in person

In 2023, Quirk's is bringing LA back into the mix! Enjoy LA in February (22-23) and then cool off in Chicago at the end of March (27-28). We'll be hopping across the pond for Quirk's London in May (3-4)!

Finally, wrap up your in-person events with us at Quirk's New York in July (19-20). Keep an eye out for sessions and other event details to be added to www.TheQuirksEvent.com in January! It's sure to be our best year yet!

Write for Quirk's

Quirk's readers are an active, engaged audience of client-side marketing researchers and research suppliers. Our main goal with our content is to give readers interesting, objective and helpful insights and information about

any and all aspects of the marketing research process. Do you have something to say? Let us help you reach our audience! If you are interested in writing for our magazine please reach out to us through EditorialGuidelines@quirks.com using the subject line "Write for Quirk's."

// E-newsworthy

Seeing insights from the other side of the table
https://bit.ly/3r3cjyq

Client-side researchers share new tools and methodologies they plan to explore
https://bit.ly/3C3qnhD

Work and play: Improvisation and not failing
https://bit.ly/3Sa0ylF

// Noted Posts

Quirk's Blog

Employee advocacy: Improving experiences for employees and customers
https://bit.ly/3DPg9mv

How brands can capture the interest of Generation Z
https://bit.ly/3DLsYhJ

Using video technology to keep up with the rapid pace of change
https://bit.ly/3S9uKO0

Research Industry Voices

4 tips for conducting IVR surveys
https://bit.ly/3R70geb

How marketing researchers approach incentive strategies in 2022
https://bit.ly/3C5dfbY

Amazon Prime Day 2022: Insights and predictions for holiday shopping
https://bit.ly/3SvcNcz

Research Careers Blog

2022 Marketing Research Salary Data - Insight Suppliers
https://bit.ly/3r35dtU

2022 Marketing Research Salary Data - End-Client Insight Professionals
https://bit.ly/3R9STT4

Establishing confidence in your data as a researcher
https://bit.ly/3fevx1A

••• consumer psychology

Keep politics out of health-compliance messaging

Public messages should show respect for individual freedoms and personal choice and leave the politics at the door if communicators expect compliance, according to researchers at West Virginia University's John Chambers College of Business and Economics.

Vijay Bharti, a 2021 business administration graduate, led research examining compliance with COVID-19 recommendations and whether public health messaging held any influence. The study, 'You Can't Make Me Do It!': A Model of Consumer Compliance, was coauthored with Paula Fitzgerald, professor of business administration, and Elizabeth Gratz, now an assistant professor of marketing at St. Bonaventure University.

Bharti says communicators should consider three factors that can lead people to react against guidelines like social distancing: whether the messaging makes people feel their freedoms are restricted; whether it fails to address conditions such as COVID-19 fatigue which may create a sense of complacency; and whether people perceive an action as a matter of personal choice when messaging presents it as an ethical one.

The research also translates beyond the health care space to other challenging environments for customer compliance such as airplanes, stores and restaurants. Gratz sees their findings informing a range of issues, such as age-related compliance; consumption of alcohol, tobacco and cannabis; and even safety compliance at recreational venues like last year's Astroworld Festival, where 10 deaths and hundreds of injuries might have been prevented had safety rules been better communicated.

••• ad research

In-app ads lead to adding apps

You know those annoying ads for other apps that interrupt your app usage? Unfortunately they work very well, according to The Modern Mobile Consumer 2022: App Discovery and Monetization, a study by app economy business platform ironSource. Seventy-four percent of consumers surveyed for the study downloaded apps after viewing mobile ads for them.

Insights were collected from 30,457 consumers through opt-in surveys across thousands of mobile apps within MobileVoice, ironSource's market research solution, as well as 500 additional respondents from a control group used to eliminate bias and confirm accuracy.

Not surprisingly, entertainment and relaxation are the primary drivers of app use, with 65% of consumers repeatedly using their apps for those purposes. And a relaxing user is ideal for app makers: People say they are most likely to download new apps while on vacation or in their free time.

Among the audience surveyed in apps outside of game apps, 60% play mobile games, tying with social media for most-used type of apps. And the research confirmed what we all know: Consumers only use a small number of the apps they download, with the majority of mobile users saying they have 20 or more apps on their devices but up to 50% only use five to 10 daily.

Market research should strive for insights not just information

Perspectives from Bernd Grosserohde of GLG

How would you define insight?

An insight is knowledge that makes a difference. Differences are ubiquitous in business: sale numbers have gone down this quarter by 5%; our brand awareness in the U.S. is 20% higher than in APAC. These are just facts and numbers. In and of themselves there's nothing wrong with them. But if you can understand what difference they make for you as a decision maker, then you have an insight.

How can market research go beyond information to deliver insight?

Generating insights is not necessarily just data analysis or data interpretation. Market researchers can't miraculously turn information into insight; context matters. Market research is most powerful when it puts information in a meaningful context, when it connects new information with existing knowledge. It's important to know what business decision will be informed by the research data. Ideally, researchers will also know what decision comes next and which decisions have been made. Understanding this context is as important as the data collection and analysis itself. It allows the researcher to support business decision making, as opposed to just generating tables and PowerPoint charts.

Bernd Grosserohde
Director of Strategic Solutions, GLG
insights@glgroup.com
212-984-8500

How does market research use business context to generate insights?

Customer feedback can be useful in new product development. We could conduct a survey with potential buyers and ask what their needs are, how important certain new benefits or features would be for them and how much they are willing to pay for these features. But that's a kitchen-sink approach to research. A better practice focuses on one business decision at a time.

Product development starts with a "where-to-play" decision: What customer pain points are relevant growth opportunities? Then comes the value proposition: How does it resonate with potential buyers? How can it be improved? This is followed by monetization: What are critical value drivers of my new product, how much are customers willing to pay for it?

Research is much more insightful and actionable if it is cumulative, addressing one business decision after the other with a targeted method. A good researcher doesn't merely deliver isolated pieces of information but connects the dots to create a stream of market knowledge.

Any last thoughts on insight?

An average customer does not exist. This is true across markets and industries. Market researchers should be suspicious of averages in general and of averaging customers or buyers in particular. Different buyer segments have different needs and priorities. Accordingly, each customer segment has a different value for a business. Revealing the heterogeneity of markets and the resulting business opportunities should be the focal point of market research.

By Joseph Rydholm, Quirk's Editor

Put us in your plans for 2023

As I write this in late September, there's still a good a good chunk of 2022 left but, being in the publishing and event space, we can't help but start looking ahead to 2023. Along with our established slate of Quirk's Events for next year (Chicago, March 27-28; London, May 3-4; and New York, July 19-20) we're excited to announce that we'll be back on the West Coast in 2023 with our Quirk's Event Los Angeles on February 22-23.

We had long planned to return to California after holding events in Orange County in 2017 and 2018 (even though a local power grid failure on Day 2 of the 2017 event certainly isn't something we'd like to relive) but the pandemic had other ideas. Instead, we staged three virtual events across an eight-month span in 2020-2021!

As big believers in research (surprise!) we learn from the data we gather during and after our events and with our two U.S. conferences being in the Midwest and East Coast, we knew we needed to reengage with researchers west of the Rockies, whether vendors or client-siders, so a return to California is a natural expansion for us.

In our DNA

Serving corporate researchers is in our DNA. Always has been – from the day back in 1986 that one-time corporate researcher Tom Quirk published the first issue of Quirk's Marketing Research Review – always will be. Thus it's been interesting to watch as some MR industry organizations have shifted their long-standing focus from research vendors to those on the client side, almost as if they felt they'd suddenly discovered an audience whose needs were not being met by anyone else. That's fine, though. We'll just keep doing what we've been doing for over 35 years!

On that note, while I have you, if you're a corporate researcher, I hope you'll consider speaking at a 2023 Quirk's event. One of the wonderful benefits of our longevity is the relationships we've established with so many of you and your willingness to get up on stage for 30 minutes and share your knowledge with your peers is what makes our gatherings so great.

If you've spoken at a Quirk's event, thank you! If you haven't, here's a quick overview of the process. Our events don't have subject tracks, per se, as we have found it can be difficult to force themes or topics together. Rather, our goal is to assemble two days of presentations that cover a wide range of topics. Sessions that share real-world experiences, strategies, case studies, best practices and effective uses of research techniques are of particular interest, as past attendees have told us they truly enjoy hearing how others have solved some of the same problems they may be facing themselves. And I always caution prospective speakers to not self-censor. You don't have to be cutting-edge to be of value to the audience!

Already gearing up

To my earlier point, while 2023 may seem far away, we're already gearing up to recruit speakers for next year's events. Here are our general target dates for when we would like to have session titles and descriptions submitted to us for each event (session slide decks are not due until five or six business days before the actual event):

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Joe Rydholm can be reached at joe@quirks.com

Los Angeles (February 22-23): *session titles and descriptions due by December 2*

Chicago (March 27-28): *titles and descriptions due by January 2*

London (May 3-4): *titles and descriptions due by February 3*

New York (July 19-20): *titles and descriptions due by March 3*

Not to leave our awesome vendor readers out, as you're the ones who have stepped up to fill the pages of the magazine with your articles all these years, since most corporate researchers are typically constrained by their internal PR/coms teams from even uttering the phrase marketing research in print! I've been blessed to have so many passionate vendor-side authors write for us and those who have embraced the role of thought leader have delivered the same kind of helpful, real-world advice in print that we try to give voice to at our event speaking sessions.

So no matter which side you're on, and whether you're a prospective event speaker, attendee or article author, I hope you'll make a plan to work with us in the coming year.

Companies hire me to find out what their customers REALLY think about their brands. And the best way to do that is to talk to them directly, in-person, face-to-face. There's no better way to connect with a customer, experience empathy, make them feel comfortable, and encourage them to share their thoughts.
Bruce Peoples, Consumer Insights Consultant at Peoples Marketing Insights

As global travel continues to increase, we're excited to welcome our clients in-person both near and far. It's been exciting to dig back in the toolbox and pull out some of the more robust methodology options that involved a more personal, face-to-face experience. Our clients are loving not only the rich insight gains but also the unique experience of visiting participants in their city and immersing themselves in their culture.
Abby Goodell, President of Fieldwork Network International

There's a richness of interaction and that transmission of feeling, of communication, that comes with the sync of not only words but body language. And simply put, the humanity of being with others. The acoustics are not quite the same when a song is compressed into digital bits of data, and human interaction is no different. Some of the richness of that interaction and some of the opportunity for empathy is simply lost along the way.
Cory Lebson, Principal at Lebsontech

It is estimated that over 70% of communication happens below the neck. Product features like touch, weight, and contrast are simply not conveyed correctly in digital environments.
Jamin Brazil, Happy Market Research Podcast Host

#facetofacemrx

In-person research always has and always will play an important role for market researchers. In-person research is important for behavioral research whether testing reactions to life-sized stimuli, conducting eye-tracking, observational research or ethnography. Many game changing insights for companies would not have happened without in-person research. We behave differently in-person versus online and while each tool plays a different role in the market researchers toolkit, in-person is irreplaceable for certain research initiatives. With in-person research you can observe behavioral nuances, understand cultural influences and capture the impromptu moments when true inspiration and insight can happen. We've all been there when the biggest insight comes when the moderator leaves the room and the respondents talk on their own! Here's to a return to in-person research, enhanced collaboration, stronger emotional connections and measuring behavior.
Anne Stephenson, Partner at Explorer Research

INNOVATIVE PRODUCTS & SERVICES

The marketing research and insights industry is constantly changing. New techniques and innovations are being made and improved at an extremely fast pace. Staying on top of the new methodologies and technologies doesn't need to be difficult. Whether you're searching for new technology, software or services, these companies offer the newest innovations and tools to help your research stay up to speed!

Innovation is a journey and we brought our map

Catapult's innovation architects have spent 15 years designing unique journeys to guide our partners through engaging, high-touch growth experiences. Our work has kickstarted and nurtured efforts that became award-winning products, industry-leading CX and names of brands that are known around the world.

The best ideas come from combining the right process and people at the right time. That's why we developed our LUMINARY process. LUMINARY provides the structure and focus required for success while remaining flexible enough to meet any level of need and accommodate existing processes.

LUMINARY covers everything from identifying opportunity areas to idea generation and concept development, interspersed with engagements among specialized audiences. Enlisting the talents of these groups lends direction, purpose and voice to your innovation pipeline to elevate outcomes and stack the deck in favor of success. Our agile, high-touch process keeps your team engaged while maintaining momentum toward your goals.

A recent Tier I automotive OEM supplier enjoyed great success with LUMINARY: "This approach goes well beyond the internal brainstorming sessions we have traditionally run. The thought-provoking process guided us to think much further into the future and excited our innovation team to evolve an even wider range of new ideas into reality. And the volume and quality of ideas were incredible."

To supercharge your innovation efforts, contact us at hello@catapultinsights.com.

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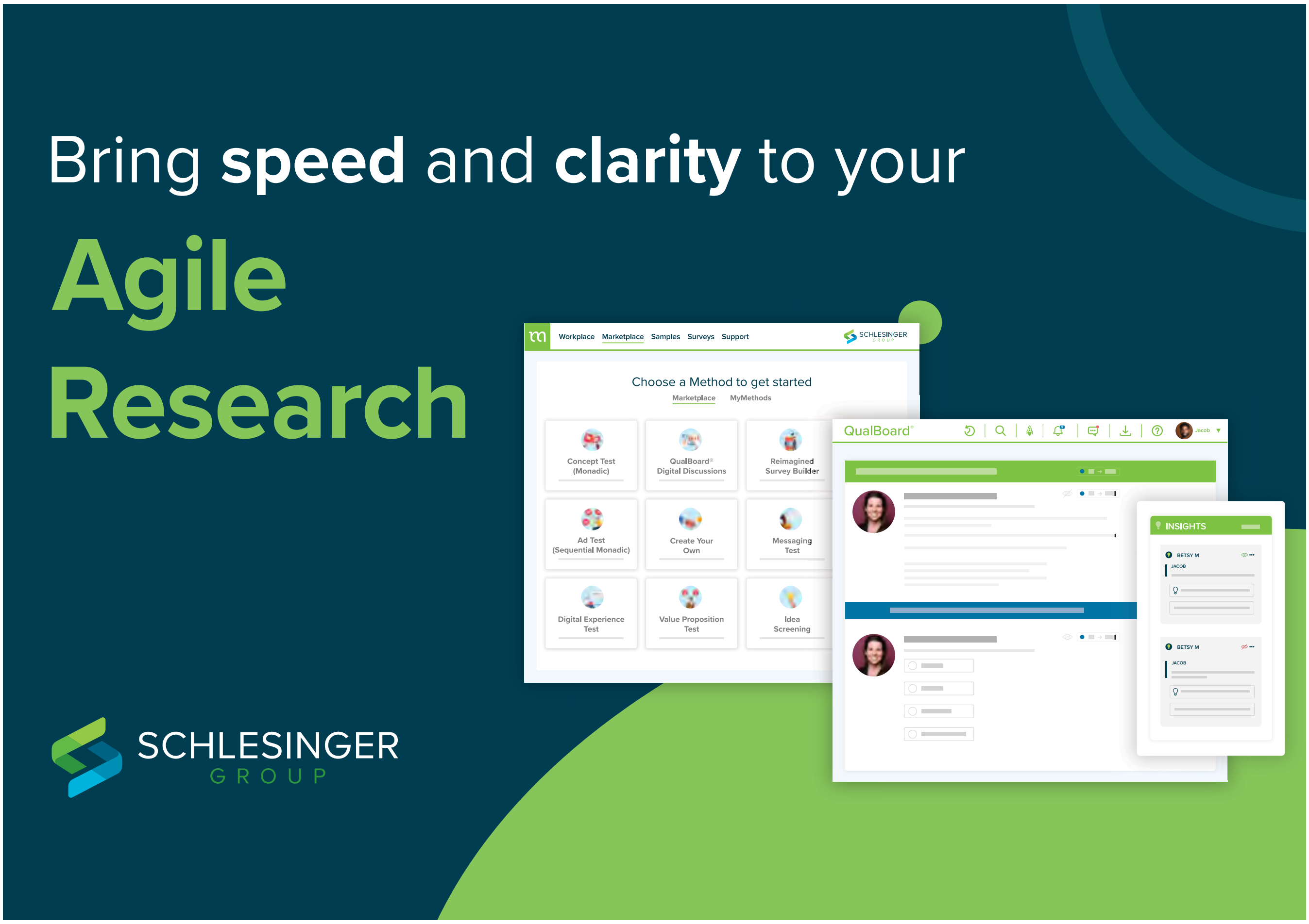


Powering your insights

Agile research helps teams achieve better results by delivering outcomes to their customers iteratively based on consumer feedback. To reap these benefits, the process needs to be simple, efficient and a positive experience for respondents. Schlesinger Group makes that possible with two agile research technologies: QualBoard and Methodify.

QualBoard

Gain valuable information from your target audience, conveniently and without slowing down your research process with QualBoard, Schlesinger Group's online discussion technology. Focused respondents participate on their own schedules, providing you with more in-depth answers. Plus, you don't have to be physically present, which cuts down on travel costs and project timelines. You can count on built-in automation and AI, which allows you to stay focused on the research without getting bogged down with the iterative parts of the process. QualBoard puts agile, qualitative research at your fingertips.

Methodify

Develop products, services or campaigns intelligently with a quantitative agile research toolkit that incorporates the voice of the customer earlier and on more projects. Methodify, Schlesinger Group's automated quantitative research engine, simplifies project setup and provides results in hours so your focus stays on delivering valuable insights rather than fieldwork. Keep your process moving without compromising on quality by enabling more team members to create or view projects. Empower your organization to make reliable, data-driven decisions with Methodify.

Agile research technology checklist

- Customizable solutions
- Streamlined setup process
- Easily shareable results
- Quick project turnaround
- Positive respondent experience

www.SchlesingerGroup.com

Fuel your curiosity with insights that will make you say, 'Aha!'

Behind every business decision is the data to support it. Beyond the data is the story behind it. It's the story, or the "why," that adds value and brings the data to life.

Asking "Why?" can unlock the true potential of a business and inform you of the proper direction to go in. Collaborating with the right research partner is the key to answering this primary question. However, most research tools fall short, placing pressure on researchers to work harder to reach accurate results.

Enter GroupSolver, an intelligent research platform that gives companies the power to ask and answer, "Why?" seamlessly. GroupSolver eases researchers' stress through its comprehensive suite of methodologies and flexible service offerings and by serving as a thought partner to uncover the data story. GroupSolver is built on:

Accessible insights

From the GroupSolver Unlimited subscription to on-demand expertise, GroupSolver can tailor their approach to fit specific needs for organizations of all shapes and sizes.

Confident technology

Their proprietary AI tools and quantitative methodologies are constantly evolving to help clients move forward with confidence.

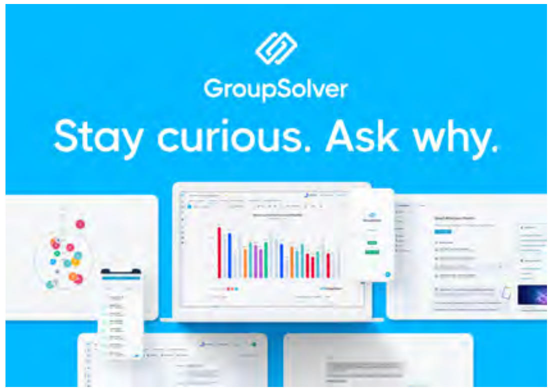
Enjoyable user experience

Every touchpoint of GroupSolver's research process is enjoyable – for both the researchers developing the studies to the respondents participating in them.

Passionate data storytellers

GroupSolver's team is passionate about redefining research and analysis by clearly articulating the story the data is revealing to their customers.

www.groupsolver.com



Maximizing new product success: Behavioral innovation testing and market share projection

It's no secret that 95% of new products launched each year fail to make an impact. Regardless, the pressure to develop and launch a new product is something every company eventually faces. However, with massive investments in new product development and high failure rates, many brands now might forgo the NPD efforts – especially during economic pressures. But uncertain times have proven to be the mother of innovation and now is the time to think about pushing out new products and tapping into changing consumer needs. But how to do so reliably and scalably? With remote behavioral research focusing on volumetrics and market share estimation!

Why this approach?

Nowadays, most automated research platforms on the market only allow researchers to pick category shoppers, at best. Driven by this, we ensured our solution is highly customizable and tailored to each study – by adding more granular subcategory criteria including usage frequency, understanding brand awareness and openness to purchasing the new product and even filtering the geolocation in some cases. With every added testing criteria, the potential risk of a new launch gets smaller.

With the remote research approach, we can conduct studies in over 40 countries across the globe via respondents' mobile or desktop devices – enabling our clients to tap into any market.

How do we do it?

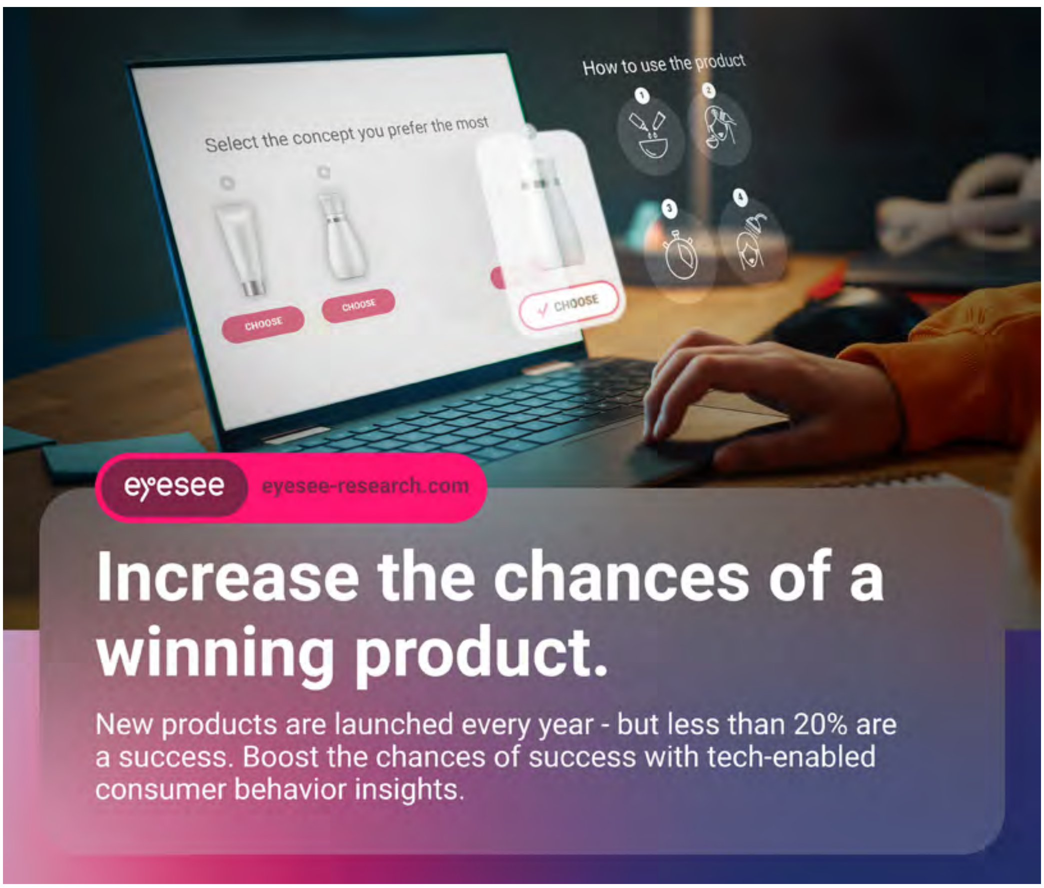
A unique mix of methods and contextual research is imperative in driving the success of any innovation. Given that our tests are conducted remotely and on respondents' devices to enable the findings' scalability, developing highly realistic yet virtual shopping environments was essential. When it comes to new product launches in stores, we are able to recreate any store or retail environment with high accuracy, allowing shoppers to buy products as they normally would. With eye tracking, we can also measure respondents' eye gazes to understand what they are or are not looking at and if they are noticing the new product on the shelf.

The same goes for e-commerce – we can develop websites or webpage mock-ups such as Amazon, Target, Kroger and let respondents shop and explore as they do in real life while we collect data about their shopping behavior.

Having the ability and agility to put them in a context that feels familiar and authentic and do so remotely for any market is undoubtedly the key player in estimating the success of any new product launch strategy.

Ready to develop winning new products? Reach out to us!

eyesee-research.com



Automating your curiosity

The fragmentation within the insights industry runs deep.

Building a survey? There's a tool for that. Need to run a conjoint analysis? There's a separate platform for that. What about visualizing the data? Don't worry – there is *yet* another tool for that.

While many of these tools work well enough to serve their specific niche within the market research space, they've also contributed to data silos and fragmented knowledge within organizations. But that doesn't have to be the case.

The only insights platform you'll ever need

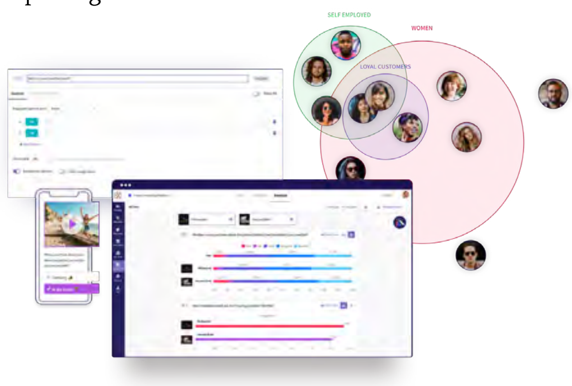
SightX is a unified solution for consumer engagement, understanding, advanced analysis and reporting. Build projects, distribute surveys, conduct experiments, collaborate with your team and visualize the results, all in a centralized hub.

It's no surprise that the average research analyst wastes 45%-70% of their time on repetitive manual tasks; hello data cleaning, formatting and restructuring. SightX was built for those who would rather use their time exploring the meaning behind the data.

With SightX, you can own the entire research process from start to finish; we call it end-to-end for a reason. Design studies as simple or advanced as your use-case requires and automate your most time-consuming projects like concept testing, conjoint analysis and MaxDiff to accelerate your research.

Plus, the SightX platform puts a wide range of advanced analysis capabilities right at your fingertips, allowing you to gather actionable insights in real-time with just the click of a button.

sightx.io



Everyone deserves insights they can trust

In an ever-evolving landscape, it is imperative to understand the needs of tomorrow's customers, today. To meet this demand, InnovateMR has developed a technology suite that combines the very best of our trailblazing ingenuity.

With the award-winning Vision Suite™ from InnovateMR, research just got suite. Take advantage of unlimited users, unlimited surveys, unlimited responses with no fees, contracts or minimums and reduce time and cost to insights without compromising quality. Gain access to a comprehensive collection of next-generation products including:

- Agile survey creation enablement with templatized questions.
- Direct integration with our proprietary B2B and consumer audiences in 95+ countries.
- Simple and transparent feasibility.
- Precision field management tools including field pacing, real-time alerts via text or e-mail and custom quota management.
- Advanced fraud mitigation checks and tools including the award-winning Text Analyzer™, evaluating open-end responses at scale, and CloudResearch's Sentry red herring tool.
- Reporting analytics and global filtering functionality.
- A do-it-together approach, with access to a network of experienced consultants and a team of Vision Suite technology experts.

Tell us about your latest research challenges and let us know how we can support you in your research goals. Ready to team up? Let's do-it-together. Learn more or contact us at www.innovatemr.com or info@innovatemr.com.

DTECT, the field management tool that puts the power in your hands

There's more to life than babysitting research studies and scrubbing IDs. With innovative products like DTECT, we take the hard work out of your research so that you can focus on growing your business.

DTECT merges purpose-built mobile app technology with intelligent supply monitoring to bring you a first-of-its-kind tool that provides oversight, alerts and corrective action to ensure your market research is on point. DTECT watches your projects so you don't have to.

DTECT focuses on just one component of your operations – supply. Supply is everything to your business. Therefore, supply is everything to our business. That's why we do it so well.

Here are all the ways DTECT makes your life easier:

- Adjust your mix of supply to ensure you deliver the most real completes in the least amount of time.
- Watch trends in survey traffic and react instinctively.
- Onboard supply quickly in race-to-the-finish projects.
- Achieve a strong conversion rate without cutting into your margins.
- Deliver on niche B2B studies.

We understand that one app isn't the answer to all of life's troubles. But with less stress at the office and more free time outside of it, there's bound to be a ripple effect. Visit our website at res.tech or e-mail us at hello@res.tech to learn more.

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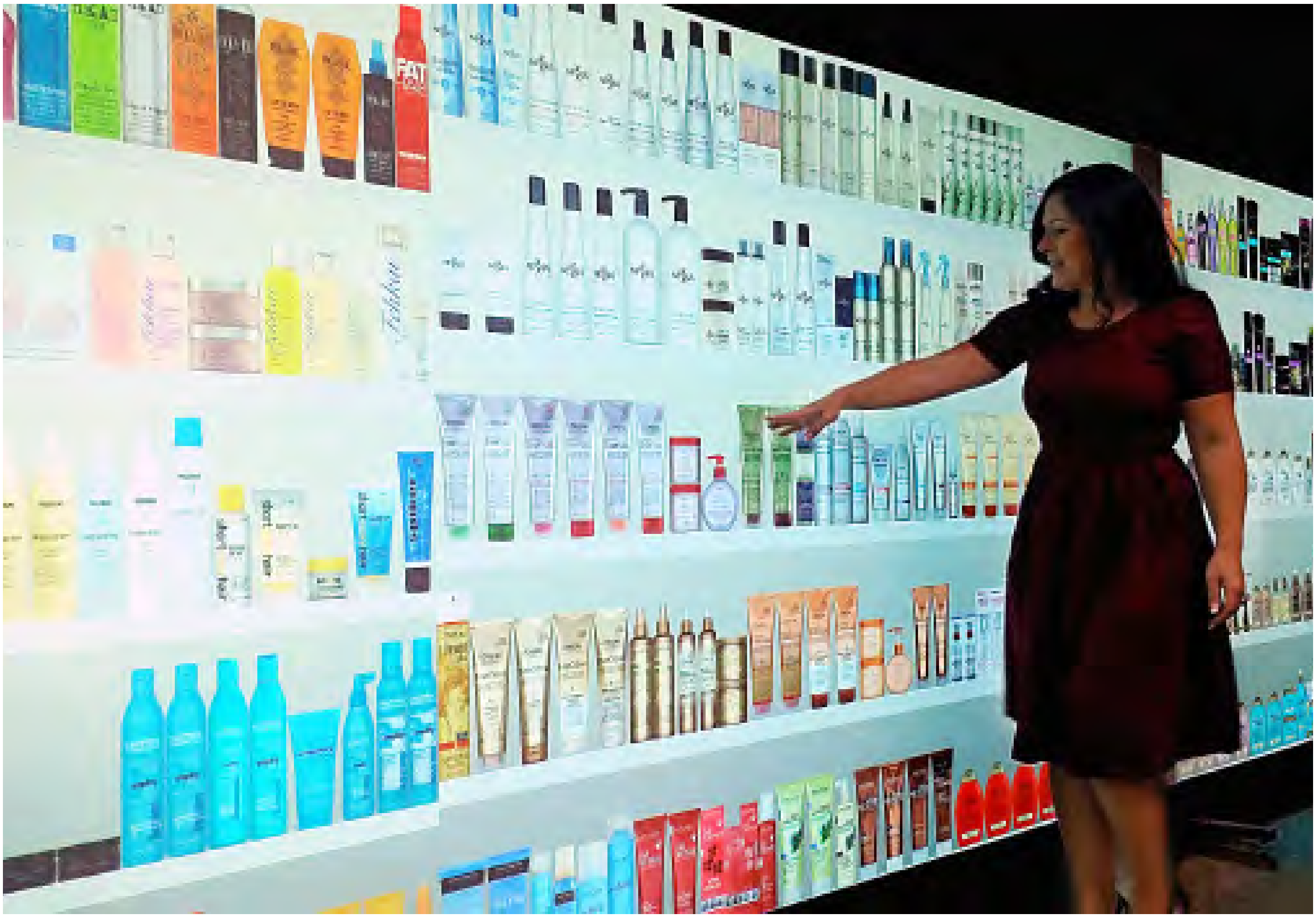

IDG's life-sized virtual aisle

Informed Decision Group's Mobile Virtual Aisle is a life-sized experience that enables in-context store and shelf learning while being portable to anywhere in the world. Using eye-tracking and qualitative interviews, IDG can extract immediate insights from shoppers' interactions with the aisle.

By integrating quantitative data from IDG's mobile eye-tracking and qualitative insights from follow-up interviews/shop-alongs, concise and effective shelf/packaging decisions can be made quickly and with full confidence.

The Mobile Virtual Aisle can also be used in more advanced statistical scenarios such as conjoint methods. The Life-Sized Virtual Conjoint provides results that more accurately extrapolate to the market by using stimuli that better reflect the actual shopping process (e.g., life-sized and interactive stimuli using real planograms and menu layouts).

This conjoint approach allows the participants to shop just as they would in-store or in-restaurant while a customized conjoint design is in place for accurate price modeling, volumetric forecasting, TURF optimizations and market simulations.

Test and optimize:

- Packaging
- Planograms
- Signage
- Displays
- Menu boards

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Together, we can make an impact

MONTH OF SERVICE

During the month of January 2023, the **Marketing Research Education Foundation (MREF)** is helping to organize service groups across multiple locations. Grab your fellow researchers and do some good for your community! Together, we can make an impact.

Need to know:

- **Think global, act local.** We can make a global impact when individuals and companies volunteer at the local level.
- **Serve at your favorite nonprofit.** Or, the MREF can connect you with an organization.
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••• health care research

Time for a (virtual) checkup

Patients prioritize health care convenience

If the pandemic impacted anything, it's the awareness we have of our general wellness and health care habits. As everyone settles into a new normal, the way health care is approached and viewed is starting to stabilize. The 2022 CVS Health Care Insights Study found that on average, people care about their health just as much or more than they did before the pandemic.

People are staying on top of their checkups, health screenings and their relationships with their primary care physicians. Many are also taking advantage of the increasing virtual visitation options.

Patients are pursuing higher engagement levels with their doctors, seeking in-depth conversations about their health and advice on how to improve it. Eighty-one percent of those surveyed by CVS want their primary care providers to be aware of their satisfaction and overall happiness with life. Eighty-one percent also want their providers to understand their stress levels and how they cope with difficult situations and 80% say it is important for providers to be aware of their health goals.

Although people want to communicate more with their primary physicians, some are still uneasy when discussing mental health concerns. Eleven percent indicate they're embarrassed or ashamed to get mental health help and 10% believe the services available don't benefit them and they wouldn't use them. Fifty-seven percent of health care providers surveyed say proper access to mental health professionals would be very helpful to their patients and 48% always or often refer patients to professionals to achieve health goals. In fact, 40% of physicians believe that mental health services are very helpful and, if needed, they would use them and 26% find them helpful and have used the services themselves.

Virtual visits became the go-to throughout the pandemic and today they are seen as the most convenient option. Ninety-two percent of people say convenience is an important factor when choosing a health care provider. When comparing in-person and virtual visits, 41% believe going virtual is more convenient because they don't have to leave the house, 37% say they save time and 37% say they don't have to cover transportation costs. Understanding the preference for virtual options, 54% of providers added virtual capabilities, 43% added mobile capabilities and 42% added online portals. Fifty-three percent of providers say adding a virtual option increased the number of patient visits, 93% believe patients are more likely to make appointments virtually and 88% believe patients are more likely to keep virtual appointments.

Whether consulting virtually or in-person, trust levels have increased between patient and provider. Fifty-nine percent indicate that their primary care physician is the provider they trust most, 22% say their pharmacist trust levels have increased and 27% indicate that their trust levels towards nurses have increased. Forty-three percent indicate having a greater appreciation for health care providers.

The CVS Health Care Insights Study was fielded by research firm Market Measurement. The survey was conducted with 1,000 U.S. participants 18 years and older and 400 health care providers.

••• shopper insights

Back at a healthy clip

Americans (re)turn to couponing as prices rise

As inflation has soared, many Americans have turned to couponing to save money, according to a study conducted by U.S. News & World Report, with 58% of Americans surveyed saying they search for coupons at least once a week and 25% search monthly.

Whether it be to gain tips or inspiration, 51% of respondents indicated that they follow blogs and social media accounts dedicated to couponing. Of those, 87% have used the advice they see on the accounts. Twenty-seven percent follow at least one Facebook page dedicated to couponing and 30% follow at least one couponing blog. Twelve percent follow TikTok couponing accounts and 15% follow accounts on Instagram.

Many respondents use digital coupons both online and in-store. Seventy-six percent indicated that they have searched for coupons online while grocery shopping to take advantage of exclusive in-app coupons or deals on grocers' websites.

Ninety-one percent of couponers who use browser extensions, apps or couponing sites say they have saved money on their purchases. Seventy-six percent of those respondents have at least one coupon browser extension installed and 44% regularly use their preferred couponing sites, apps and browser extensions.

Consumers use various couponing methods for in-person and online purchases. Sixty-seven percent prefer promotional codes that offer online purchase discounts and 54% sought coupons for free shipping. Fifty-eight percent are interested in buy-one-get-one coupons and 58% say they use rebate offers.

When asked about holiday spending this year, many Americans indicated they would adjust their spending habits. Fifty-two percent are expecting to spend less on holiday gifts. Fifty-one percent are planning to use couponing apps, websites and browser extensions to reduce the amount spent. Respondents indicate that on top of couponing they will be shopping on Black Friday and Cyber Monday to help decrease the total amount they spend.

This survey was conducted among 2,002 U.S. adults ages 18 and older by U.S. News & World Report in July 2022.

••• customer service research

'Please hold'

How long is too long for customer-support calls?

Picture this: You purchase a product and after the first use, it breaks. You hop on a customer support call to see what can be done. This scenario can go one of two ways: you either get the situation promptly handled or, if you're like most Americans, according to data from a survey conducted by call-center platform provider TCN and OnePoll, you're put on hold for an average of 14.6 minutes before speaking to a representative.

When asked in the survey how long they were willing to wait to reach the customer service department, 35% answered five to seven minutes, 31% two to four minutes, 16% six to 10 minutes, 9% 11 minutes or longer and 9% were not willing to wait over two minutes. Twenty-six percent of callers have been placed on hold for six to 10 minutes and 25% have waited 11-15 minutes. These answers are not too shocking, given the above-cited average wait time, but 15% of respondents have waited 16-20 minutes and 11% have been on hold for 31 minutes or longer.

Although respondents dread the long hold times, 49% prefer to speak to a live agent by phone and 45% prefer to chat online with a live agent. Live agents can quickly address the problem yet 45% of respondents prefer to reach out via e-mail, 29% use automated phone service options, 27% use company text features, 22% use company chatbots and 20% prefer social media platforms to initiate a conversation.

Customers have opinions on what makes a good customer service agent. Fifty-two percent indicated that an agent should be able to solve their issue, 41% want them to be knowledgeable about the product or service and 39% believe agents should have authority to make decisions, which, in theory at least should reduce call lengths and speed call resolution. Customers prefer agents who can handle their issues while having welcoming qualities: 44% want an agent to be willing to help; 36% want them to be pleasant to speak to; and 32% want compassionate agents.

Fifty percent of Americans responded that their greatest frustration when calling a customer service department is the fear that their call will disconnect after a long hold time. Other frustrations include having to speak to several departments or people about the issue before it gets resolved (45%), dealing with an agent who is unable to solve the issue (41%), the time it takes to resolve the issue (37%) and when the issue remains unresolved (36%).

If customers have a good experience with a company, 55% would write an online review and 71% are likely to endorse the brands they've had positive interactions with. When customers receive a poor customer service experience, however, 27% are very likely and 39% are somewhat likely to abandon the brand.

The survey was conducted by TNC and OnePoll with 1,000 U.S. adults between May 12-16, 2022.

••• financial services research

Convenience vs. security

Cashless payment options lead to safety concerns

We are entering a cashless era where it is increasingly common to rely more on a cell phone's digital wallet and payment apps like Venmo or PayPal than a physical one. According to a Pew Research Center survey, Americans are interested in the convenience of digital payments but are aware of the potential dangers: What if you forget your password? What happens if someone logs into your account? What if these apps are not as secure as they claim to be?

Seventy-six percent of Americans use at least one of the four apps or sites within the study (PayPal, Venmo, Cash App or Zelle). PayPal, the most popular digital payment method, is used by 57% of Americans. Sixty-three percent of 18-29-year-olds, 66% of 30-49-year-olds and 55% of 50-64-year-olds use the service. PayPal is followed by Venmo, which is used most by the younger generations. The service is used by 57% of people ages 18-29 and 49% of people 30-49. Thirty-eight percent of U.S. adults use Venmo, 36% use Zelle and 26% use Cash App as alternative forms of payment.

Sixty-one percent of Americans who use these payment methods say it makes purchasing products easier. Forty-seven percent use the services to send money to people safely and 34% use them because others use them. Forty-four percent of the youngest age group, ages 18-29, use payment sites or apps to split expenses with others. This is a less common reason for 30-49-year-olds (23%) and those 50+ (7%).

Although many users rely on these apps or sites, they are still aware of the dangers they can bring. A higher percentage of older Americans are warier of using cashless options. Seventy-one percent of respondents 50+ are not interested in alternative payment methods, 64% say they don't need them, 20% don't know how to use them and 66% don't trust them with their money.

When asked about safety, people aged 18-49 felt slightly safer with payment apps than those 50+. Twenty-two percent of them feel that their information is extremely safe, 47% think it is somewhat safe and 31% say it is a little or not safe at all. Seventeen percent of users aged 50+ think their information is extremely safe, 44% say it's somewhat safe and 39% say it is a little or not safe at all. Overall, 46% of users think their information is somewhat safe. Digital payment apps and sites try to protect personal information but many users still fear being hacked or falling victim to scams. Thirteen percent of U.S. adults have been scammed and 11% have had their account hacked.

This survey was conducted by the Pew Research Center with 6,034 U.S. adults from July 5-17, 2022. The results included 4,996 respondents from the Center's American Trends Panel and 1,038 respondents from Ipsos' KnowledgePanel.

••• shopper insights

Move over, Christmas

Events like Black Friday gaining holiday-like status for shoppers

While holidays like Christmas or Halloween are seasonal events that are popular with shoppers, commercial events like Black Friday and Cyber Monday are climbing the sales charts. According to research by YouGov, Christmas is the most shopped-for seasonal event (57%), followed by Mother's Day/Father's Day (26%) and Black Friday/Cyber Monday (25%).

Christmas is shopped most by Great Britain (76%), Spain (74%) and Poland (73%). Mexico (39%), Great Britain (35%) and Poland (34%) are the top three countries that shop for Mother's Day and Father's Day. Black Friday and Cyber Monday are dominated by Spain (41%), Italy (40%) and Singapore (32%).

When making purchases, 51% of Mother's Day and Father's Day shoppers plan one to three weeks in advance and 32% prepare the week before. Sixty-five percent of Christmas shoppers plan two to three weeks in advance and 41% prepare at least a month before. Over 20% of Black Friday or Cyber Monday customers prepare two to three days in advance and just over 20% plan the day before or the day of.

On Mother's Day and Father's Day, 74% of consumers purchase food/drink items, 70% buy confectionary items and 67% make clothing, shoe and accessory purchases. Eighty-seven percent of Black Friday or Cyber Monday shoppers purchase clothes, shoes and accessories, 62% buy electronics and 60% purchase cosmetics/toiletries.

Younger consumers are more likely to shop on Black Friday or Cyber Monday compared to consumers 55+. Nearly 30% of people ages 18-24 and 30% of 25-34-year-olds participated in either sale event last year while only 18% of consumers 55 years or older made purchases.

Although online purchases are convenient, most consumers prefer to shop in-store for seasonal events. Thirty-eight percent shop mainly in-store for clothes/shoes/accessories, 49% for jewelry/watches/luxury items, 47% for cosmetics/toiletries, 45% shop for household appliances and 46% for household goods. Thirty-eight percent of consumers say they gain shopping inspiration by browsing stores, 26% through social media, 25% through family or friend recommendations, 23% through brand websites and 15% through TV advertising.

Who are these seasonal shoppers buying for? Not surprisingly, 64% of Mother's Day or Father's Day purchases are for parents or for a partner's parents. Purchases are also made for neighbors, friends and other relatives. Forty-one percent of Christmas shoppers are purchasing items for relatives, about 45% are shopping for children and over 40% are shopping for their partners. The majority of Black Friday or Cyber Monday shoppers are making purchases for themselves (68%) but are also shopping for their partners and parents.

The survey was conducted in 18 markets including Great Britain, Indonesia, Germany, France, Mexico, Italy and the United States.

special advertising section

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Brian Cash, VP Research Services

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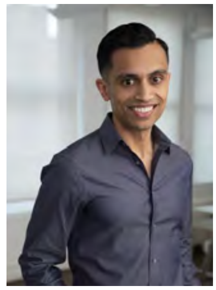

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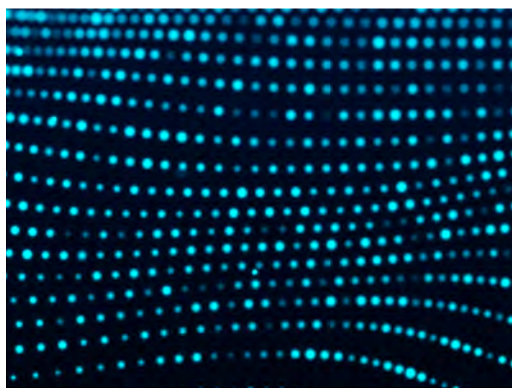

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Joe Farrell, Managing Partner

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Founded 2004 | 11 employees
Thorsten Weber, Founder and Manager
Lulu Petrina, Strategic Design and Research Manager

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MaxDiff: a countermeasure to the endemic cheating

| By Deb Ploskonka

snapshot

Deb Ploskonka details findings from two case studies using MaxDiff to catch fraudulent respondents.

An uncomfortable theme is beginning to dominate our industry, at least for those of us who draw sample from online panels.

It's fraud.

Over time, we have had to shed our naivete around how cheaters cheat and how extensive the problem is. We have learned we must go out of our way with every online project to protect our data, our insights and our clients from falsehoods. The investment we are making to ensure clean data has risen dramatically over time, in proportion to the increasing fraud present, leading to this article.

Figure 1 shows a sampling of Cambia's online panel toss rates over the past five years, for B2B and B2C studies, from almost a dozen panels. Although individual records may look fine in isolation, when we look across respondents, we see patterns of duplication indicating fraud. From these rates, it appears B2B studies are more attractive to fraudsters, likely due to the higher incentives. Additionally, consider what the incidence of fraudsters may be to that of the target audience. If your target audience is extremely narrow, fraudsters who figure out the qualification criteria may fill your quotas faster than genuine respondents.

The degree of fraud has become so pervasive, and the skills of fraudsters so advanced, that it will take all of us to defeat it: sample suppliers, research agencies, software companies, corporate researchers, end clients and industry organizations such as ESOMAR and Insights Association.

Figure 1

Online Panel Toss Rates

Note: Sampling of recent toss rates from Cambia's B2B and B2C online panel studies

Add random noise

Why does it matter? Conventional research industry wisdom has been that lower-quality respondents simply add random noise and cancel each other out, softening the findings but not meaningfully changing them.

Whether true or not in the past, this is certainly not true now. Over and over we at Cambia are seeing similar, non-random patterns of responses among those who are clearly fraudulent, such as: over-selection of multiple-response items; over-selection of anything that might be interpreted as a qualifier, even deep into the survey (e.g., "I own this product"); and higher ratings on scale-based questions.

Indexed results of cheaters vs. good respondents from a recent Cambia B2C study confirmed that cheaters tend to over-select and that their data can meaningfully change survey findings. If including data from these less reliable respondents in reporting, disappointment may follow when the research results fail to align with reality.

With B2B studies, we often see cheaters: claiming they are the CEO (even of a $1B company); claiming they are the sole decision maker; or saying yes to any "yes/no" question that may seem to be a screening question.

Cheaters are experienced at survey-taking and often know what is likely to qualify them for a study, amplified if the question or response options are leading in any way. Any low-incidence study (e.g., IT decision makers, C-suite, physicians) is a particularly rich target due to higher-than-average incentives. Between imperfect targeting by panels and their partners and fake personas created by motivated fraudsters, data collected online must be regarded with suspicion until thoroughly scrubbed to the point of having adequate confidence in what remains.

More effective solutions

Understanding the variety of ways in which our data is now under attack can enable us to develop more effective and comprehensive solutions. This is not a one-time activity, however, as fraudsters are constantly evolving – when one strategy gets identified and blocked, another route is found. There is no single solution for ensuring data quality: it takes a diverse variety of tools, as well as transparent partnership with sample suppliers and security services. Working together is our only hope of success. Our full report on endemic cheating covers our learnings and approaches to combating fraud in depth, including a checklist to use with every project: https://www.cambiainfo.com/dec-download-page/.

Today we'd like to share a new tool our research uncovered that we have added to our fraud-detection toolbox. If you're not yet familiar with it, MaxDiff (maximum difference scaling, aka best-worst scaling) is a question type where respondents are shown subsets of items/attributes and are asked to indicate which is the best and which is the worst.

Two of its many advantages are that it yields a rank ordering of the items with ratio-scaling properties and it eliminates any opportunity for scale use bias to play a role in the results.

For a standard MaxDiff, respondents typically see six to 15 MaxDiff questions like the example in Figure 2. For a MaxDiff added solely for the purpose of catching cheaters and not as part of the research objectives, six to 10 would suffice. Items are rotated across the questions such that each item would appear a total of two to four times per respondent.

In preparation for the paper Cambia agreed to write and present at the 2022 Sawtooth Software Conference, Cambia and Sawtooth Software discussed data quality challenges and the ways in which MaxDiff might effectively identify fraudsters. Three approaches were discussed:

- MaxDiff can identify those answering randomly – responses require internal consistency to pass the root likelihood (RLH) check.
- MaxDiff can identify those straight-lining on position – given that MaxDiff displays items in random positions, someone choosing the same location each time is not taking the exercise seriously.
- Programs/bots – if not immediately obvious, can be identified by reverse engineering segment assignments on utilities run when data collection is nearing completion.

The first approach has been available for years. The second was generated in recent times by Kenneth Fairchild, when with Sawtooth Software. The third was newly tested by Cambia and first presented at this conference, subsequently leading to a paper, a report and this article. We'll now apply these approaches to a B2B and a B2C case study.

B2B case study

A client requested a quick-turn online version of an ongoing phone study of low-incidence, niche IT decision makers. Dropping the phone version into an online package led us to omit our

Figure 2

When considering eating at a fast food restaurant, among the four attributes shown here, which of these is the **most** and **least** important?

1 / 14

Most Important		Least Important
●	Reasonable prices	○
○	Healthy food choices	○
○	Has a play area	●
○	Clean bathrooms	○

standard open-ended questions and bot-catchers.

Overnight, numerous quotas filled (over 80% of the total target). We found:

- Verbatim responses for “exact job title” perfectly matched options from the subsequent question on job role, including capitalization.
- Low-incidence audience went from one out of 30 qualifying to 29 out of 30 qualifying.
- Time stamps showed a new survey taken about every 20 minutes.
- Closed-ended responses were not duplicated across respondents, nor straightlined.

On their own, each individual record looked fine but in context, they were impossible. We immediately raised this to our supplier, who raised it to their security service. The supplier confirmed our study had been attacked by bots, allowing previously blacklisted respondents to enter. An unethical source had exploited a loophole in the security service, manipulating the data within the URL to eliminate quality flags.

The best part about this B2B study was that it included a MaxDiff exercise, which gave us an unexpected opportunity to test our hypothesis. The MaxDiff had 24 items, each seen three times per respondent, with four items per task. The 238 “respondents” that came in overnight were sufficient to run the hierarchical Bayes statistical model and then k-means cluster analysis to place respondents into mutually exclusive groups (segments). Prior to segmentation, the utilities looked ordinary, though undifferentiated, and would not have raised an alert.

The segmentation, however, was outstandingly clear and sharp: 99.7% reproducible for the three-segment solution.

Visually inspecting the mean utility per item per segment, it quickly became clear the bot had been run with three programs, or strategies, for the MaxDiff, resulting in these three segments:

Segment A: Longest attributes were chosen as most important; shortest attributes as least important. Correlation across the 24 items of the rank order of the length of the item with the mean utility score for that segment was +0.95, highly significant.

Segment B: Items were selected randomly. Sawtooth Software’s suggested RLH cutoff of 0.336, designed to catch 80%, would indeed not have caught all of these. However, raising the cutoff to 0.396 would have captured them all but would also have captured 15% of Segments A and C.

Segment C: Shortest attributes were chosen as most important; longest attributes as least important. Correlation as in Segment A was now negative, at -0.90, highly significant.

By using multiple strategies, the bot disguised, at least initially, that it was a bot. Had there been only one approach, it would have been immediately obvious upon inspection of the data without segmentation.

As a result, whenever you have a MaxDiff study, we highly recommend running a segmentation on the resulting utilities regardless of whether it is part of the study’s objectives. If there are highly reproducible segments, see if you can reverse-engineer what was done, realizing that the rule next time might be the number of letter e’s in the attribute. Fraudsters adapt quickly. If you find bots, or any other repeated issue, please tell your supplier.

When you have a study without a MaxDiff, see if a short, simple one (e.g., 10 items) can be added to potentially catch cheaters. Ideally also include an actual bot checker such as reCAPTCHA if your panel provider is not already doing so.

B2C case study

Cambia conducted a B2C test study specifically to test MaxDiff’s effectiveness in catching cheaters. We partnered with Symmetric, a long-time data quality advocate and sample provider, to source a variety of online panels for the test. Informed by our B2B experience, the 11 MaxDiff attributes, seen three times, in groups of four, were each of differing lengths.

We analyzed the data by looking at the various data-check flags enabled, divided into three categories: panel pre-screening, in-survey penalties and post-survey analysis. We identified and named five types of fraudulent respondents:

1. Hackers are digitally identified prior to entering the survey via auto-

Figure 3

Data Quality Checks: Incidence

		Decision	Fraudster Categories				
		Fail	Hackers	Bots	Con Artists	Slackers	Pros
Panel Pre-screening	reCAPTCHA	0%	0%	0%	0%	0%	0%
	Duplicate IP	31%	75%	0%	0%	0%	0%
	Time Zone Mismatch	15%	37%	0%	0%	0%	0%
	Country Mismatch	1%	2%	0%	0%	0%	0%
	Pre-Screener Red Herring	16%	14%	0%	27%	9%	21%
	NET: Pre-Screener	**51%**	**100%**	**0%**	**27%**	**9%**	**21%**
In-Survey Penalties	Speeder	5%	1%	0%	13%	1%	9%
	Select 'X' for the Grid Row	44%	29%	0%	62%	47%	53%
	Agreement w/Opposing Statements	6%	5%	0%	5%	6%	12%
	Straightlining	30%	22%	0%	40%	32%	29%
	In-Survey Red Herring	20%	20%	0%	15%	24%	24%
	MaxDiff Position Straightlining	11%	8%	0%	15%	12%	15%
	NET: In-Survey	**67%**	**54%**	**0%**	**80%**	**71%**	**76%**
Post-Survey Analysis	MaxDiff RLH Responded Randomly	60%	39%	0%	70%	79%	74%
	Open-End Review	34%	21%	0%	100%	0%	0%
	40+ Attempts Last 24 Hours	24%	22%	0%	32%	0%	100%
	Honeypot	0%	0%	0%	0%	0%	0%
	Visual Inspection	0%	0%	0%	0%	0%	0%
	MaxDiff Segmentation	0%	0%	0%	0%	0%	0%
	Supplier Bot Verification	0%	0%	0%	0%	0%	0%
	NET: Post-Survey	**78%**	**59%**	**0%**	**100%**	**79%**	**100%**

Item contributed to category assignment

mated digital methods such as device fingerprint duplication.

2. Bots are programs developed to complete large volumes of survey to rack up rewards and can be observed in the data by visual inspection.
3. Con Artists are humans taking surveys purely to rack up rewards and are most easily identified through open-end responses.
4. Slackers (aka satisficers), the more familiar type who have always been in survey data, can be addressed with in-survey checks such as red herrings and trap questions.
5. Pros are people who possibly make a living taking surveys, in some cases attempting 80 a day or more.

These categories are further described in our report at www.cambiainfo.com/dec-download-page, along with approaches to deter them.

Figure 3 shows the numerous ways in which we flagged potential bad respondents. Highlighted are the items contributing to each category assignment. Pros and Con Artists share qualities with Slackers, except for number of surveys and bad open-ends, respectively. All three of these categories responded randomly to the MaxDiff at least 70% of the time, while Hackers responded randomly 39% of the time.

Another way to look at the data-cleaning process for this study is what would have happened had we turned away or terminated potential respondents as soon as we had information showing we wouldn't want to keep them. Had we turned on the pre-survey tools available through Symmetric, 26% would have been prevented from entering (Hackers + pre-screener red herring failures). Of those remaining, 17% (Slackers) would have been caught during the survey if we had automatically terminated those with two or more in-survey penalty strikes. Of those remaining, we would have tossed only 8% for having poor open-ended responses (in our experience, this figure is often much higher, especially for B2B). Given the short, engaging, high-incidence survey, we hypothesize our chances of having genuine respondents complete the survey were much higher.

And lastly, 13% of the final group would have been tossed for having a low RLH, indicating they had responded to the MaxDiff randomly. Had we used MaxDiff as the only tool for identifying cheaters, 62% of the 503 tossed would have been caught (60% for low RLH, an additional 2% for straightlining) – pretty effective!

Hypothesis was confirmed

Our hypothesis that MaxDiff could effectively catch many cheaters was confirmed, as in both case studies, it caught the majority. We therefore recommend including a MaxDiff wherever possible. Other reasons to include one could be to assess attitudes, usage or behaviors. Whenever you have a MaxDiff, run segmentation and examine the results. A follow-up question may also be included as questionnaire space allows, e.g., "Which of these is the most important to you?" to help validate the MaxDiff findings.

Fraudsters are continually evolving their approaches and so we must do the same. While humans will continue to be required to manually review data for fraud, you can reduce the amount of time (labor) spent by incorporating as many quantitative and automated approaches as possible.

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Do people pay attention to all attributes when making purchase choices?

| By Steve Cohen

snapshot

Steve Cohen uses attribute attendance choice-based conjoint to better understand choice behavior.

When developing new products or services, brands often obsess about the attributes they hope will influence consumer behavior, often using choice models to identify characteristics that are most persuasive.

Big surprise? Only some of the attributes you bake into your products command enough consumer attention in the moment of purchase to influence choice in meaningful ways.

Discrete choice models work best to identify the attributes most likely to influence consumer choice when they accommodate attribute attention as a component of choice criteria. In this article, we share what we believe is the best way to address attribute attention, using an improved approach to choice modeling.

May not process all attributes

Classic choice models assume that people maximize their utility by processing all attributes when making their choices. For various reasons, people may not process all attributes but rather select important ones and/or ignore unimportant ones.

Choice-based conjoint analysis (CBCA) has been a bedrock of marketing research for many years. A basic assumption is that by displaying a full set of product attributes to the consumer, she will use all information in her decision-making. A challenge is the interpretation of a small importance coefficient for an attribute. Is it small because the attribute was processed but she doesn't care about it? Or was the attribute ignored and not processed at all? Choice models assume that people use a trade-off decision process that takes into account all the information available.

But is that true? Are all attributes used? Does everyone use the same ones? Are predictions from CBCA the same when we assume everyone pays attention to all attributes versus every person only pays attention to attributes of salience to them personally?

If you could estimate who does and does not utilize all attribute information, and learn which attributes those are, you would get better results than under the standard "all attributes" assumption. Attribute attendance choice models provide better results, closer fit to choice data and yield a deeper understanding of exactly what drives choice behavior.

To investigate this we used a CBCA approach that we call attribute attendance choice-based conjoint analysis or AA-CBCA. The data was based on a study concerning consumers' choice of an infrequently purchased durable product with seven attributes: (1) brand; (2-5) four ratings of aspects of the products' performance (taken from a reliable product review source); (6) the number of years included in the warranty; and (7) price.

Attribute attendance is estimated by assuming that some people did or did not pay attention to each attribute. Whether someone is paying attention to each attribute is unknown beforehand but our AA-CBCA approach hypothesizes that each individual pays attention to each of the seven attributes disproportionately. This "paying attention" is measured by seven latent (meaning hidden or unknown) binary measures – one for each attribute.

At the same time, we extracted choice-based latent classes, which tell us the if the importance of each attribute that is processed differs across different groups of people. This is a choice-based segmentation of the respondents which uncovers people whose drivers of choice are different from one another. In this case, we also take into account whether they pay attention to each or not by using the seven latent measures.

Each respondent completed 10 choice tasks with five different alternatives shown: four branded products described by the six remaining attributes plus the choice of NONE. We randomly selected one task as a holdout and estimated AA-CBCA using the remaining nine choices. For now, we omit the interpretation of the choice-based segments.

We compared results from AA-CBCA using just the nine choice tasks against the results of a latent class choice model (LCCM) that does not account for attribute attendance. Again, only AA-CBCA includes the seven latent binary attribute attendance groups.

Bayesian information criterion (which we refer to as BIC) is a number that evaluates how well the predictions from a model fit the data it was generated from. In statistics, BIC is used to compare the results from different possible models and to determine which one is the best fit for the data. Lower numbers are better.

The best-fitting model according to BIC is the one that explains the greatest amount of variation using the fewest possible independent variables. "Best" in this case means the model with the smallest BIC compared to models that were estimated with fewer or more latent choice classes.

The table shows the results of the best-fitting latent class choice model and attribute attendance-CBCA analyses. For example, in the LCCM row, a six-group solution yielded the lowest BIC when compared to LCCM solutions with two, three, four, five and seven latent classes (these results are not shown for article brevity).

In the attribute attendance-CBCA row, the model with seven binary attribute attendance groups and three choice segments provided the best fit when compared to fewer or more latent classes, each with seven binary AA groups (again, not shown).

You will note that the BIC for attribute attendance-CBCA is smaller than the best latent class choice model results. This means that attribute attendance-CBCA provides a better overall fit to the choice data than does a standard latent class model.

Prediction success (PS) measures the ability of the model to predict the nine actual choices made by the respondents. PS favors attribute attendance-CBCA over latent class choice models, and it only needs roughly half as many coefficients.

Finally, the R^2 in any choice model measures the increased explanatory power over a simpler, more naïve model. The R^2 tells us that seven binary attribute attendance groups and just three choice classes explain more of the data than does a six-group standard LCCM.

"BEST" MODEL	Number of Latent Choice Classes	BIC	N of Coefficients Estimated	Prediction Success	R^2
Latent Class Choice Model (LCCM)	6	18645	175	66%	42%
Attribute Attendance CBCA (includes seven AA groups)	3	17961	96	72%	51%

Delve deeper

What else can we learn from Attribute Attendance-CBCA? Since people were classified into paying attention or not to each of the seven attributes, we can delve deeper.

The product under study is infrequently purchased, so we think that explains why the brand name is used by just one-third of people. People are just not aware of each brand's value since they are not in the market for their products often.

Attribute	% Using the Attribute in Decision-Making
Brand	37%
Rating 1	96%
Rating 2	80%
Rating 3	92%
Rating 4	88%
Warranty Years	62%
Price	72%

Instead, the online review site, well-known across product categories, is used just about all the time (Rating 1 and 3) or almost always (Rating 2 and 4). Trailing behind these are the price and the number of years of warranty (see table).

We can also ask: How many people pay attention to or use all seven product attributes in their decision-making? Sadly, just 10% of people employ all seven attributes, another 17% pay attention to six (all attributes except brand) and 11% pay attention to five (all except brand and warranty). These findings suggest strongly that the product ratings should be featured prominently in any communications with consumers.

Capture attention and influence choice

Especially for infrequent purchases or in categories where people may be unfamiliar with the features and functionalities of the category offerings, it is important for marketers to design products or services with attributes that are beneficial and differentiating. Just as important is knowing which attributes are most likely to capture the consumer's attention and influence choice in the critical moment in which they are considering your product versus that of a competitor. We believe therefore that attribute attendance-CBCA is a strong addition to understanding buyer behavior when developing or marketing a new product and should be included in your next investigation of consumer choice.

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

BUILD A BACKPACK

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A real page-turner

How the elements of story can enliven your research reports

| By Nancy Cox

snapshot

From employing archetypes to working with dialog, Nancy Cox explores writerly ways to go from researcher to storyteller.

Brain researchers made the research industry care about story. Before the functional MRI demonstrated how brains light up in response to story, storytelling was, using parlance of the game show "The $100,000 Pyramid," in the category of "Interesting Skills My Job Does Not Require." Researchers have been quick to reframe storytelling into the category "Necessary Skills to Communicate Insights." Given this acceptance of – and even demand for – story, what's been the challenge in moving from accepting storytelling to applying it? Paradoxically, it's been myths about storytelling. Let's replace those two of those story myths with story skills!

Myth #1: Storytelling = Fitting data into a plot template
BUSTED: A plot template doesn't fit all data

If you've ever given up in frustration trying to wrangle data into a storytelling template, you've run up against using the demands of plot. It's not you. It's not your data. It's the plot template. That template demands an escalating causal event sequence. Plot is the answer to, "What happens in this movie or novel?" Think about answering that question for Harry Potter. It would be frustrating to listen to an answer that starts with book seven then goes to book three, then oops, perhaps we need to start with book one. Ah, the first challenge with plot: The plot answer requires answering in event sequence.

This is deeper than chronological sequence. First, data must be ordered with causality from one data point to another. Correlation is not strong enough for plot. Second, each event must build in intensity. That intensity

build might be true for some consumer experiences (every episode of the TV show "Say Yes to the Dress" is edited to demonstrate this) but not for others. Perhaps the most intense data point occurs early in the sequence, such as deciphering health insurance options during enrollment – the next steps to enrollment may de-escalate in intensity. No plot template has the climax as the first event. Third, no data point can be a side note to this causal sequence. Back to the Harry Potter example, answering "what happens" with a character analysis of Professor Snape derails the audience even if that's your most insightful commentary. Similarly, forcing data into a plot template may prevent you from communicating a key point.

Certainly, explore a plot as an option. Your findings on the time-pressed wedding dress shopper may plot neatly with other race-against-the-clock stories such as the movie "Speed." Use the pursuit story plot. Perhaps even refer to "Speed" for comparison. Put effort into understanding plot models with a reference book such as "20 Master Plots" by Ronald B. Tobias. A book like this will help avoid oversimplifying plot into the one, two or six plots. The usefulness of one universal plot formula is like only using the AutoSum formula in Excel. There are notable distinctions between plots – for example the difference between the underdog/Cinderella plot (disadvantaged competitor) and the rivalry plot (competitors evenly matched). Telling an underdog market-share data story is different than a rivalry market-share data story.

For those recalling the hero's journey plot as a monomyth – THE universal myth – also recall that the hero's journey has 17 distinct characteristics as identified by Joseph Campbell. The hero's journey is extremely popular (like Excel's AutoSum), enduring and appealing across cultures – well worth knowing as a plot and there are compelling research reports that have used the hero's journey. But 17 distinct characteristics make it, well, distinct from other plots. Not to mention that its by-nature epic sweep requires lengthy narration: almost 600,000 words for the Lord of the Rings books, over 1 million for the Harry Potter books.

How do you know if it's worth exploring plot as a data storytelling option? When there is value to answering every question that was asked and probed, every data analysis and cross-tab, plot is not the best approach. Including all the data violates the basic plot rule of Chekhov's gun: "One must never place a loaded rifle on the stage if it isn't going to go off. It's wrong to make promises you don't mean to keep," wrote Russian playwright Anton Chekhov, advising another writer. In other words, plot templates don't allow for sidebars, slides that address outlying data points or new, unanswered questions that the research turns up. A useful metaphor is to imagine data points as dominos. Do they line up in a sequence, each one in its proper place tipping into the next one, building up to a major conclusion such as the last domino climaxing in a dramatic balloon release? With no extraneous dominos left standing (or slides you simply cannot edit out)? If you have "dominoed" your data, then plot is a good storytelling device for your story. If not, good news! There are other storytelling elements that light up an audience's brains.

Myth #2: If I can't use plot, I don't have a story
BUSTED: Use story elements – dialog, character and setting

If plot explains what happens in a story, elements like dialog, character and even setting can answer the more research report-relevant question: "What's this story about?" In fact, quotes (dialog), respondents/participants (characters) and secondary/contextual data (setting) are already part of research reporting. You may need just a few story skills to ramp up the story power.

Dialog story skills for quotes

A common way to add story or interesting detail to a report is through quotes or verbatims. The need for that "color commentary" even drives methodology decisions – the desire to hear the voice behind the numbers. Maximize your investment of time and money to gather these quotes by using quotes like writers use dialog.

First dialog story skill: avoid expository dialog. Expository data is that awkward dialog when characters are filling in backstory. This dialog never rings true to how people really talk. For example, *Judy sighs to her brother Joe, "Our family store hasn't been the same since our dad died two weeks ago."* That feels more like a soap opera than real life. It's useful background info for the audience but these siblings already know the impact of their father's death on the family store. A writer would use narrative rather than dialog to communicate the father's death and its impact: *Two weeks ago, Judy and Joe had promised mourners at their father's funeral that the store would not change.* The reader's brain is now primed with the necessary facts, primed for more emotionally revealing dialog: *"I didn't know I could lie so easily. And I plan to keep lying," said Judy.*

In research storytelling we have a similar opportunity to strengthen our quotes by separating the expository from the respondent's own words and feelings. For example, say the research yielded this quote: "I totally agree that baby wipes are very high-priced. I'm now making my own baby wipes – I shared that on TikTok." The price-related finding expressed in the first statement is one we've likely already put forth in a narrative data point: "80% top two-box agreement that baby wipes are high or very high priced." Editing the quote to, "I'm now making my own baby wipes – I shared that on TikTok" does what we want it to do: bring to light the real-life impact of the pricing.

Exposition often sneaks into quotes as respondents answer questions by repeating the research question. For example, a researcher says, "Describe the perfect room-painting experience." The consumer responds, "My perfect room-painting experience would be that my partner agrees, with no arguments about my color preference, the paint covers in one coat and the paint on the wall matches the color chip." Since this quote is in the report section on perfect experiences, edit to focus on the answer: "My partner agrees, with no arguments about my color preference, the paint covers in one coat and the paint on the wall matches the color chip."

Second dialog story skill: writers give the most lines to the most important characters and on the most important themes. Number of quotes + length of quotes = audience time. Is the priority consumer segment quoted

most? The critical topic? Or did a subtopic stage an attention coup with the most quotes? Try this book editor technique: highlight different characters' quotes with different-colored highlighters. Squinting at the manuscript, it's easy to see who dominates. Sometimes, a supposedly minor character has taken over! Non-fiction editors do the same with expert quotes but highlight by topic. Easy to do the same with quotes in a report – highlight by priorities.

Longer quotes often get the star treatment visually as well, landing in slide hotspots of the Z-pattern reading flow – especially spotlighted in the four corners. Again, do these quotes deserve the spotlight? A quick test: Do they work like an elevator speech? In other words, would you want this respondent to speak this quote to a key decision maker in an elevator?

Third dialog story skill: put care into how you handle the best lines and best quotes. Here's a storytelling secret: writers give the best lines to the characters they want you to like the most. Think about your favorite characters in fiction, in movies, in video games or even in commercials. Writers are appealing to readers' universal desire to be that person with the best lines, the one who utters the perfect turn of phrase at the perfect moment vs. thinking of it hours later. It's even tempting when it's the villain: "Luke, I am your father."

Who has the best lines or quotes in your report? Are they from the consumers or the point of view you want the audience to like best? A great line goes a long way toward influencing decision makers. When facing the challenge of having several great quotes, using this "best quote, like best" filter can help choose which quote to feature.

Again, consider the visual emphasis of this best quote. The great line is not delivered off-camera. The character delivers in closeup. Who do you see when you read these lines?

"Go ahead. Make my day."

"Cinderella story. Outta nowhere. A former greenskeeper now about to become the Masters champion."

"Toto, I've a feeling we're not in Kansas anymore."

Do a closeup on the great quote with font size, color, perhaps including a photo, with lots of white space around

Sometimes a respondent delivers a highly memorable, entertaining quote but it doesn't serve the needs of the report. Don't include it. Good writers know that sometimes that they have to "kill their darlings."

the quote or video clip. Another writing tip: use best lines EARLY – no need to save them for a punchy ending or a climax.

One last test for the great line: Can it become shorthand for the report? Quotes like, "Houston, we have a problem," "If you build it, he will come," and "Show me the money" sum up "What's this story about?" If you have that quote, maximize it! Use it in e-mails like a movie trailer for the report. Display it large on the screen as attendees shuffle into the meeting. If you have a memorable quote but you don't want it to be shorthand for the report, think hard about including it. Sometimes a respondent delivers a highly memorable, entertaining quote but it doesn't serve the needs of the report. Don't include it. Good writers know that sometimes that they have to "kill their darlings."

Archetype resonance – a character story skill

Archetypes are a very powerful characterization tool. So powerful that they create understanding without plot. The misunderstood hero. The fish out of water. The wise child. Archetypes are more resonant, timeless and universal than personas or segments. Segments or personas exist only in their context as they are constructed from specific, situational behavioral and attitudinal data (plus possible biases). Archetypes also differ from stereotypes or cliches because they are rounded with both light and shadow. Stereotypes or cliches are flattened by biases into one-dimensionality.

You may already be using archetypes indirectly. When respondents answer questions such as, "If Brand X were a famous person, who would that be?" they may reveal archetypes. There's an archetype in a respondent's answer of, "I see this brand like Johnny Cash, as a rebel." Go deeper into the rebel archetype. What's the secondary pop-culture analysis of Johnny Cash as the rebel? (Perhaps this is a generational view.) You can still use the quote about Johnny Cash but highlight the rebel archetype to take your audience beyond the celebrity aspect. Also, Johnny Cash had a long career, which may represent various archetypes to your audience depending on their generation, their feelings about country music or the band Nine Inch Nails. By going deeper to the archetype, you hit upon the universal (rebel) underlying the specific and take your report discussion to a deeper level beyond musical preferences.

In data analysis, archetypes can pop up when respondents use simile or metaphor. Look for phrases like "I feel like…" in your data. A respondent may not say the word "queen" but she may say, "When I enter at Thanksgiving with my sweet potato pie, everyone stops talking and makes a path for me." Or UX research may reveal a new user who not only quickly sees the value of your service but also has advice that would benefit more-experienced users. Sounding "wise beyond their years" is a hallmark of the wise child archetype. The paradox of the wise child is that while this new user has the potential to be influential by enthusiastically sharing his insightful advice, he could be dismissed by more-experienced users as being a newbie. How would you help the wise child resolve this tension to become an effective brand advocate?

MasterClass offers a brisk overview of 12 common archetypes connected to Jungian archetypes. For more nuance consider adding a more robust archetype overview to your researcher toolkit such as the Caroline Myss 80 archetype card deck. Card decks like these can also be used in research methodology – having respondents choose archetypes that represent brands, products/services or themselves. Having the larger set

allows for actionable nuances. Explore lists of stock characters as well – "fish out of water" may not appear in standard archetype lists but this character has archetypical resonance.

Two considerations with archetypes. One: Every archetype has both light/shadow. This is a key distinction between archetypes and stereotypes (stereotypes are negative) and cliches (oversimplified to be good or bad). For example, when researching what archetype applies to the smart phone, the vampire kept coming up. Yes, the smart-phone-as-vampire has a definite shadow side – it sucks attention and time, it drains energy. But you also have to acknowledge it as seductive, something with which you have an enjoyable relationship – making it more like the sexy vampire Edward from "Twilight" than the ghoulish Nosferatu (who deserved the stake in his heart).

Consideration two: While universal, examples can be highly individual. Back to the idea of Johnny Cash as rebel. With respondents, it can be helpful to ask for other rebel examples or for instances when the respondent felt like a rebel before pressing for the connection between rebel and the research topic. These further examples will help your audience see the universal aspects of the archetype vs. fixating on one example that might not resonate or could provoke an argument over whether Johnny Cash really was a rebel. (Or confuse the person who's never heard of Johnny Cash.)

Setting: Because research "takes place"

The story element of setting, of establishing time and place, opens most research reports, beginning with objectives ("Once upon a time, we were sent to find…") and methodology (focus groups, nationwide online polling, etc.). There is debate about the value of putting this grounding information up front, with suggestions that perhaps it is better left to the appendix – get right to the recommendations or executive summary, the thinking goes. Some even suggest the researcher is burying the lede by not stating critical insights right away.

There is an emerging reason for stating this setting information at the outset. In today's world of rapid staff turnover, establishing the setting of the research (time, place, methodology) may be even more critical. The team that started the project likely has new members who don't have the institutional knowledge of the objectives or haven't read the methodology e-mails, etc. Without setting the stage, it's like entering a movie after the first 10 minutes or skipping the opening chapter of a mystery novel. In addition, even if the original team has remained intact during the project, the team is fluid on both the supplier and the client side. The research report is the keeper of institutional memory – not the people.

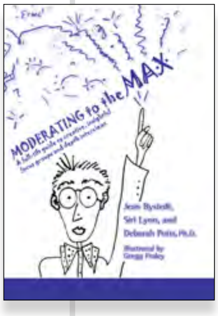
How do you resolve the debate between wanting those opening slides to establish critical grounding but also draw your audience into the research? Take a bold step by having a respondent (i.e., character) set the stage. Ask a respondent to introduce him or herself by describing the location, the time of day, who is with them and why what they have to say is important. You may find you have to ask the importance question twice – at the beginning and at the end when the respondent has reflected more on the topic. This classic storytelling technique opens stories such as "Field of Dreams" (both the book and the movie), "Catcher in the Rye" and "Where the Wild Things Are." Don't skip the part about their location, time of day and who is with them – those details help to make that critical shift from being together in a meeting to being together with your respondents. To add a further consumer-centric touch, have a respondent thank the attendees at the end, perhaps reinforcing a key point.

Go write

Story elements are already in your reporting. A few story skills polish them to shine. Writing, however, is the only way to apply those skills. Go write. Light up some brains.

Nancy Cox is the founder of Research Story Consulting. She can be reached at nancy@researchstoryconsulting.com.

ESSENTIAL READING FOR RESEARCH PROFESSIONALS



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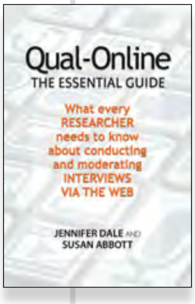

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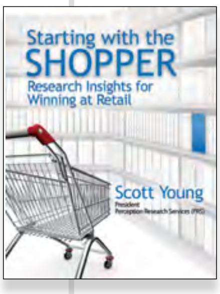

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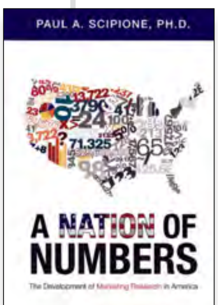

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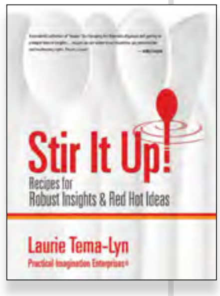

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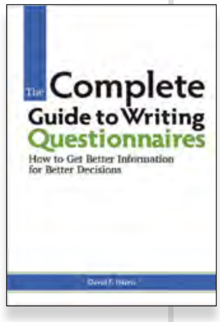

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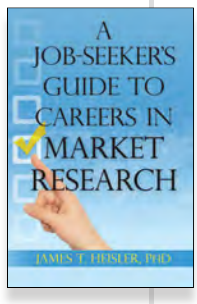

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••• financial services research

Right on the money

Building a cohesive brand revitalization for SurePayroll

| By Lisa Brink and Karen Stoychoff

snapshot

Online payroll and benefits services firm SurePayroll used a multidisciplinary approach to guide its brand refresh.

Brand positioning is no longer just for B2C companies. Today's leading B2B brands like Google, Slack, Adobe and Salesforce understand the valuable ways brand positioning supports growth and serves as a key marketplace differentiator.

However, even the strength of the most dominant brands can fade over time. Increased competition, lack of relevance, an unwillingness to change and failure to sustain an emotional connection with consumers are just some of the factors that can tarnish a brand. But market-aware and resilient brands regularly take stock of their brand positioning and adapt.

After 22 years as the innovator and leader in online payroll and benefits services, SurePayroll faced stiff competition from new marketplace entrants. The existing value proposition – a fast and easy online solution for small business owners and household employers – remained strong and relevant. However, it was no longer a point of differentiation, with competitors leveraging a similar positioning and touting a newer online payroll experience.

Many organizations would bask in consecutive years of record growth and enviable customer satisfaction metrics. Not SurePayroll. Determined not to succumb to the age-old trap of "If it ain't broke…," SurePayroll launched a brand revitalization initiative to refine, evolve and elevate its marketplace presence and expand its distinct advantage over the competition.

SurePayroll decided to reimagine its value proposition and associated positioning to better connect on an emotional level with its three key customer segments – small business owners, household employers and resellers/CPAs.

Recognized as the original disruptor in online payroll and benefits services, SurePayroll understood the pivotal nature of the brand revitalization initiative. Redefining the brand and asserting its leadership position

would be a significant undertaking. SurePayroll turned to Gongos for strategic counsel and support; together, they began a brand revitalization initiative to position SurePayroll for long-term growth.

Beyond the traditional scope

Gongos counseled SurePayroll to leverage insights across multiple dimensions – primary, secondary and behavioral – and look beyond the traditional research scope. The team augmented the research plan with internal assessments, industry analysis, market-sizing and inspiration from brands across different verticals with winning strategies. This approach included more traditional qualitative and quantitative research in the small business, household employer and reseller/CPA sectors and a sample plan that captured insights from prospects, current customers and the customers of SurePayroll competitors. These consumer insights would reveal the competitive landscape and the placement of SurePayroll within the marketplace and also help shape understanding of competitor strengths and challenges, along with highlighting white-space positioning opportunities for the firm.

Gongos designed a methodology to better understand the SurePayroll B2B market. The goal was to gain a 360° view of the online payroll and benefits industry, customers and competitors to discover the areas that could be exploited to benefit SurePayroll. But the methodology wasn't just about the research or the secondary analysis. Equally important was the partnership and process Gongos and SurePayroll established to address the business challenge. Experienced in insight and brand strategy development, Gongos understood how important it was to solicit deep category and business expertise from the SurePayroll team. Bringing together these sources of insight (customer, industry, competitors and the SurePayroll team) enabled Gongos to bring forward a strategy that was differentiated but also achievable and actionable.

The Gongos research process explored customer segments and their unique nuances and needs – internal capabilities and barriers – and the available competitive advantages to leverage into meaningful points of difference. Research insights helped inspire three unique positioning territories SurePayroll could clearly own based on equity, market white-space opportunities and plans for future growth. Gongos completed additional qualitative work with customers to identify, optimize and validate the positioning that would best resonate with current and future SurePayroll customers.

Ultimately, Gongos developed a comprehensive brand positioning for SurePayroll based on salient insight generation and strategic thought leadership. Together, the Gongos-SurePayroll team refined the brand's value proposition and points of differentiation, informing its internal strategies to deliver a best-in-class experience and guide agency partners to develop a new external expression of the brand.

Four key challenges

Over the course of 11 months, the Gongos-SurePayroll collaboration addressed four key challenges:

- Evaluate the current SurePayroll brand presence and competitive set to identify strengths, weaknesses, opportunities and threats.
- Provide key insights and leverage points for the three customer segments (small business owners, household employers and resellers/CPAs) and understand the overlapping needs and motivations of each segment to determine if a unified brand position could be leveraged or if a separate brand was needed for each segment.
- Reconcile current-state perceptions and strengths with the standing value proposition and refine accordingly for positioning.
- Recommend the future SurePayroll brand strategy across the full-spectrum customer journey.

The Gongos approach consisted of:

Stakeholder interviews. First, Gongos conducted stakeholder interviews to understand internal perceptions of the brand and visions for the future. In addition, the team collected various artifacts and reports from SurePayroll to fully immerse in customer understanding and business performance (behavioral data).

Qualitative research. Next, Gongos conducted qualitative customer research among the three identified target segments to understand customer mind-sets, needs and experiences within the online payroll category. This sample gave a comprehensive look and understanding of SurePayroll and competing brand customers. Through extensive in-depth interviews leveraging projective exercise techniques, the team gained insights on customer needs and benefit category drivers. Additionally, the team uncovered category performance gaps and white-space opportunities.

Quantitative research. Gongos conducted quantitative research to understand how SurePayroll performed relative to the category and key competitors, proving what many leaders intuitively knew: SurePayroll delivered well on many metrics and lacked an ownable point of difference. The research also validated key white-space opportunity areas that fueled positioning development work. Finally, it helped solidify an understanding of customer needs and motivations across the three segments, helping uncover commonalities and nuances that informed both the positioning and the messaging required for each segment in marketing communications.

Secondary and industry analyses. Throughout the process, Gongos leveraged secondary information to better understand the market size and industry trends. The team supplemented quantitative work with a SWOT analysis, market opportunity sizing and identified core and secondary target segments for the proposed positioning.

Serve as a differentiator

Gongos derived inspiration for the proposed positioning from brands in different verticals, including IKEA, Zappos and Amazon. The team selected brands that illustrate how personalized service and support can elevate a primarily user-driven experience and how that support can drive consideration, build affinity and loyalty and serve as a marketplace differentiator.

IKEA, widely recognized as a DIY brand, is also a terrific service organization, according to a Forbes Communications Council article.[1] The company delivers simple-to-use services, a fantastic customer experience and around-the-clock support to solve customer problems.

Zappos has grown into an iconic online retailer because of its focus on customer service. Its customer-centric philosophy revolves around investing in customer service as opposed to traditional advertising, so customers drive word-of-mouth marketing.

Gongos also considered Amazon, a company that extends speedy delivery and personalization by giving users choices in how to reach customer service through DIY and live support options. Plus, Amazon is laser-focused on resolving issues quickly as part of its vision/mission to be "Earth's most customer-centric company."

Validate and optimize

Once Gongos developed the brand positioning concepts, the team conducted qualitative research to validate and optimize the positioning. This provided an opportunity to better understand customer and consumer reactions, the strengths and barriers to the ideas and the language that best resonated with them – helping shape the brand positioning and personality attributes.

This multipronged approach provided the insights to confidently move forward with a resonant and differentiated position to revitalize SurePayroll – a position that would build affinity with current customers and attract new ones. The research provided foundational and salient insights across the entire SurePayroll customer base to inform business strategies and decisions.

Insights are only as effective as the share-out and accompanying communication strategy. Since the SurePayroll brand revitalization would affect key stakeholders companywide, the team engaged them throughout the process. Once Gongos completed the research and finalized the strategic recommendations, they presented the findings and brand playbook in a series of executive-level sessions.

The playbook included a brand ladder – an internal manifesto to guide business priorities, strategic initiatives and creative execution – broken down by the brand purpose, personality and promise. This playbook was designed to help the SurePayroll team absorb the insights that led to the positioning and to understand the new positioning, its value proposition and how it would come to life in the organization. Additionally, a language support guide was developed to arm the organization and partner agencies with the tools necessary to activate and execute on the new brand positioning.

Gongos also developed a creative brief with a crisp articulation of the positioning strategy to hand off to the advertising agency responsible for activating a consumer-facing campaign. These deliverables proved to be a concise, compelling and persuasive narrative for the SurePayroll executive leadership, the rest of the SurePayroll organization and partners.

Laid the foundation

The brand revitalization initiative laid the foundation for SurePayroll and its partner agencies to propel the brand forward. Deep in the next phase of work to bring the strategy to life, SurePayroll is developing a new visual identity, advertising campaign and employee engagement initiative to relaunch the new brand to internal and external constituencies. In addition, this work provides a catalyst to enhance operations and build experiences to support the brand throughout the customer journey.

While many organizations tackle brand reinvention out of necessity, usually due to declining performance or lost relevance, SurePayroll had the awareness, foresight and fortitude to pursue its reinvention at peak performance. As a result, SurePayroll is well-positioned to expand its distinct advantages over the competition and pave a path to sustainable, long-term growth.

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••• health care research

Uncovering a hidden partner

The value of working with newly formed patient communities

| By Anna Shevalova and Ekaterina Nemenko

snapshot

The authors outline their learnings from a multiyear effort to investigate and engage with Duchenne muscular dystrophy patient communities.

Our team has spent several years working closely with diverse patient organizations. It has brought us to an understanding useful for the entire health care market research industry: getting to know these communities and learning how to best access them can unlock valuable insights for health care research.

Our article in the November 2020 issue of Quirk's ("Searching for a common language - Learning from virtual patient communities across the globe") provided an overview of virtual patient communities and what researchers can learn from them. We decided to build on that research and take it a step further.

First, we tried to explain the difference between various patient communities and conducted a series of in-depth interviews with representatives of patient communities focused on Duchenne muscular dystrophy (DMD) across different countries. DMD is a rare disease that impacts children – primarily young boys – and there is limited medical understanding of it. As a result, it is active with communities of parents seeking answers for their sons on how to help improve their diagnosis.

Our initial hypothesis was that there is a country-specific difference between these DMD communities or at least a difference in terms of stage of development. But the more data we gathered, the better we could see that there is a distinct type of community that we later called "newly formed" that transcends countries and cultural differences. Although the term newly formed refers to a stage of development, our research revealed this type of community is not primarily characterized as young or underdeveloped. Rather, these subsets of patient communities have values that differentiate them from communities we termed "established."

In this article, we'll compare patient communities and their value systems and describe newly formed communities as a potential partner for health care market researchers.

The starting point of our analysis was comparing many patient communities we have been working with and those we identified as newly formed. In order to understand what differentiates them and to determine whether there is any community that we as health care researchers should especially consider, we studied Duchenne patient communities across the U.S., India and Russia (Figure 1). We looked at groups that were founded at different times – between 1995 and 2020. Our goal was to compare the modes of organization of the specific communities and their relationships with the international community and pharmaceutical companies. Through this comparison, we wanted to distinguish newly formed communities from established ones.

- Based on our findings, we classify communities that have been rapidly growing over the last five years and are characterized by rare contacts with pharmaceutical companies and their government as newly formed communities.

- We categorize communities founded more than 10 years ago and working in close collaboration with pharma companies and government agencies as established.

First, we compared the principal focuses of organization in DMD parent communities and discovered newly formed patient communities (hereafter referred to as PCs) are mostly focused on education and targeted help. On the other hand, established communities develop their relationships with governments and pharmaceutical companies. Their tentacles stretch out further in part because of their years in existence and the traction they've received because of that. The functions of advocacy and drug lobbying are not developed in newly formed PCs.

Secondly, the comparison of the funding sources of DMD patient communities reveals that newly formed communities are mostly funded through private donations, while established patient communities receive funding from the government and pharma companies. The reason for this is that newly formed PCs tend to avoid direct funding from pharma to maintain their independent status.

We also compared the structure of human resources in DMD patient communities and concluded that newly formed PCs are mostly composed of parents who contribute to the community as volunteers. In short, caregivers with lived experience are principal advocates of patients' rights in newly formed PCs.

We studied relationships of newly formed PCs with pharma, the medical community and other patient organizations. Our main finding here is that newly formed PCs are rarely connected with pharma and local HCPs but they are open to collaboration with other parent communities within their native countries. They study other parent organizations and prefer to find their own area of responsibility. Since established communities depend more on financial support from pharma and government agencies, they develop independent projects to compete with other communities for funding. This is what differentiates them significantly from newly formed communities that follow a different logic.

Connected in some capacity

As we studied the international relationships of patient communities, we found they are connected in some capacity but at different levels. For example, communities in the U.S. and India are members and even parts of each other's advisory boards. We found that Russian organizations feel rather excluded from the international community regardless of their personal contacts with some of the international organizations. This is in part due to language barriers some members of Russian groups face. However, we believe that they all are integrated enough to be accessed through international parent organizations.

Figure 1

Patient communities

Finally, we compared the purpose of communication within different parent communities and realized that the members of newly formed communities rarely meet in person; they are mostly online communities that keep in touch through social and messaging platforms such as WhatsApp, Facebook and others.

Based on the data we gathered during the in-depth interviews, we concluded that newly formed patient communities are a recent phenomenon within the last decade. These communities would not be possible without the internet and the nature of how so many people now live. All newly formed PCs are characterized by a particular set of values that differentiate them from established communities and influence their potential value as a partner for health care market research.

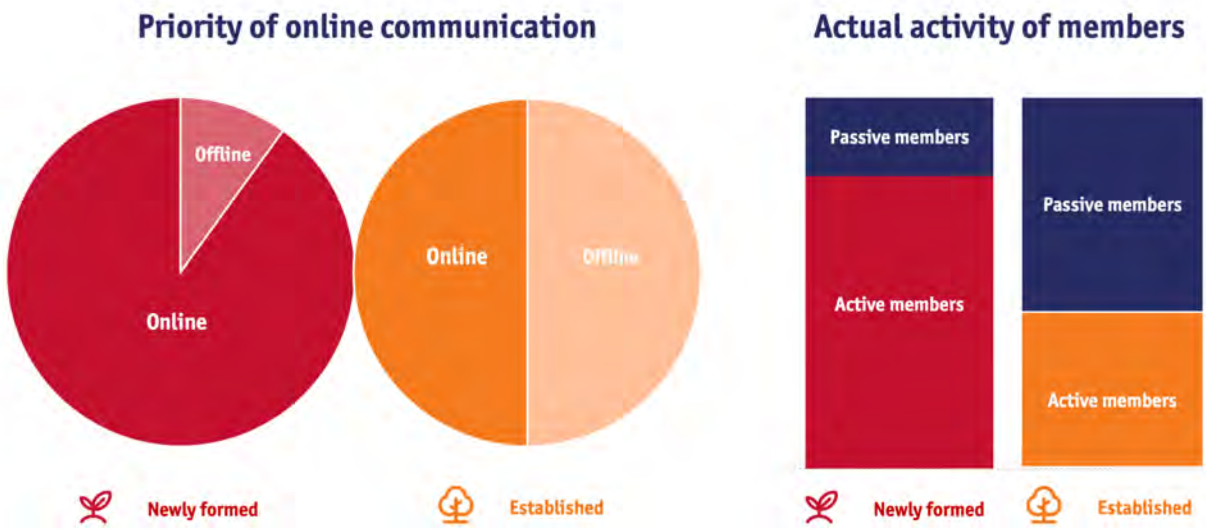
Flexibility and relative independence

Let's now look at the value that newly formed patient communities bring to health care research. As alluded to earlier, this is a particular form of community characterized primarily by its flexibility and relative independence from government and pharma companies. These features often make these communities invisible and tough to access for health care researchers. However, these communities offer a great deal of value to researchers looking for insights.

We argue that in our understanding of patient communities we should focus on their unique value system. Our data shows that one of the principal values for newly formed PCs is online presence. Offline events are rare. Their priority is fundraising and informational support of caregivers. In the case of Russian patient communities, we see they tend to work with the government, as it is the only way to affect change on the national level. But in America and India, new PCs tend to avoid contact with the government. Typically, they do not seek nor expect funding from the government.

Newly formed communities do not have physical representatives in the regions, but since they are online communities, they cover almost the whole territory of their country and include parents from remote regions that cannot be part of established communities due to lack of representation in those regions. So, our first observation is that these communities – even without

Figure 2



regional representatives – have bigger coverage of caregivers who actively communicate in their WhatsApp and Facebook groups daily (Figure 2).

Local changes

We've witnessed that newly formed communities are pragmatic self-help circles that caregivers organize to help each other rather than bring about some significant changes on the national level. This is the core of their value system, which makes them flexible and agile. They stand for local changes and helping individuals rather than focusing on systemic changes in the health care system. This will be our starting point in understanding what value this type of community can bring to health care research. These communities accumulate a big amount of educational information and even medical expertise.

As we saw in Russian newly formed communities, these PCs often consider themselves experts alongside professional health care providers who, in the case of rare genetic diseases, happen to be even less informed than the caregivers. PCs keep track of all the latest news on drugs and results of clinical trials, they study the treatment and rehabilitation process in detail and they have deep knowledge of medical equipment,

Figure 3

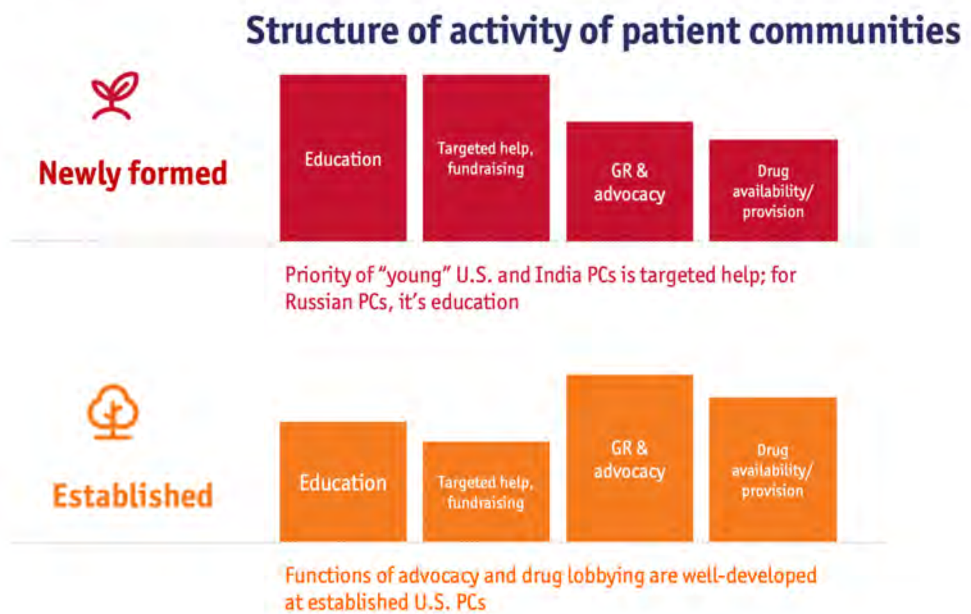


Figure 4

Our recruitment journey map

drugs and the actual situation with the supply of subsidized drugs.

Another important type of data that newly formed communities accumulate is the life of the community itself. This includes caregivers' and patients' experience, the ways they help and support each other and their knowledge of government and pharma programs and opportunities.

Observed common features

To gain a multicultural understanding of PCs for our research, we approached DMD patient organizations in the three countries. We had different experiences of recruitment in each of these three regions but we also observed common features of recruitment of newly formed communities across the countries.

We tried to contact established PCs in the U.S. using their official contact details available on their websites. However, we couldn't reach them. The main reason was that those organizations are quite large and tended to ignore our calls and e-mails – or a gatekeeper referred us to another person and we could not find the right person to talk to. Another issue was related to the restrictions on the public usage of information we could gather. Many groups in the U.S. were required to sign official papers prohibiting the sharing of any data outside the organizations. Obviously, we could not conduct our interviews under these conditions. Having failed to contact the established communities through the official channels, we tried to reach them via their

5 key takeaways from working with patient communities

1. We identified a particular type of patient community that we termed newly formed that values flexibility, online presence and independence from pharma companies. This type of community covers a larger audience of caregivers who are more pragmatic than ideological – they do not invest their time fighting for patients' rights; rather, they help each other solve specific issues, such as fundraising and providing educational support.
2. The advocacy function is not developed in newly formed communities. So, in order to get in touch with these communities, be ready to communicate with parents using the professional assistance of intermediary advocacy groups.
3. As these communities initially are not set up to receive financial support from pharmaceutical companies and the government, they are interested in non-profit collaborations as well as informational and educational support.
4. Their initial focus is on finding reliable information, so newly formed PCs are thirsty for firsthand knowledge of drug innovations and clinical trials.
5. Some of the newly formed communities are concerned about their reputation as experts. They are interested in scientific publications where they are given proper credit and in having an advisory role in the development of new drugs.

groups on Facebook. That also didn't work.

The situation with established communities in the countries where we had personal contacts with them was different. We worked before with Parent Project Russia, so they were eager to participate in our research and they gave us contacts and recommended us to other Russian patient communities. Due to the small size of the Russian DMD community and personal connections between all activists, we easily got in touch with all of them. The Indian community was also easy to get in touch with. They responded immediately without any personal contacts and were eager to participate.

After we failed to recruit established communities in the U.S., we turned to help from an organization that acts as an intermediary between patients/caregivers and pharma – the Rare Advocacy Movement (RAM). This organization protects the rights and interests of patient communities and its core consists of newly formed independent groups of caregivers. During our recruitment journey, we discovered that most of those communities do not have professional lawyers, so they delegate the advocacy function to an intermediary such as RAM.

As soon as we started working with RAM, we found out there are many small online parent organizations in different states whose main goals are fundraising and targeted help. The newly formed PCs in the U.S. are rarely institutionalized but quite effective with the support they can give to their members. Still, without the support of an advocate like RAM, these communities are often invisible and hard to reach. And even if we could find some of them without the help of RAM, they were not open to participate in our research. Without the connection of an intermediary like RAM, the PCs were not inclined to trust us and see the benefits of collaborating with a research firm. We ran into the same conundrum in Russia with a newly formed community called Gordey. Based on our findings, intermediary advocacy organizations such as RAM play a crucial role in the recruitment of the newly formed communities.

Even deeper insights

Our research provided us a great depth of knowledge of patient communities, which can offer other researchers even deeper insights into how to work with these types of communities and other difficult-to-reach or niche online communities in the future.

If you know how to communicate with specialized communities, they open more opportunities and insights for research. Without having the proper tools, these communities are almost invisible. But with the right tools, these communities can shed a great deal of light and offer new perspectives and insights that market researchers might not typically have access to.

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••• qualitative research

Invite them in

Breaking the fourth wall of research

| By Zach Mullen

snapshot

In an era when we are struggling with respondent engagement, Zach Mullen argues for the value of researchers letting down their guard.

In the qualitative world, we are continually looking to extract meaning and applicability from sets of disparate experiences. How do different perspectives come together to influence and tell a singular story? How can one person's experience be a microcosm for something that afflicts an entire set of customers?

As we try to make sense of business questions and consumer behavior in a qualitative sense, we can utilize a set of tools that extends beyond just those tailored for market research specifically. Often, common literary devices can be a key to interpreting and analyzing swaths of qualitative information: themes, archetypes and juxtaposition.

While at first glance, many of these can be perceived as only having applicability in the world of art and literature, they have become more and more present in the world of market research. Some of those overlapping examples can look like:

Analysis. Anyone who's studied classical literature or art history will tell you that the name of the game isn't seeing things for what they are, it's digging deeper and extracting the insight. It's using analyses to understand a particular motivation or reason for action – all of which are hallmarks of the market research industry.

Significance. How do we make sense of where something sits in the culture? In art and literature, it's assessing how the creative work fits (if at all) into a particular moment in time. In research, it's assessing white space and opportunity. Whether the "thing" is an oil painting or a packaged good, it's asking ourselves what does this particular thing mean in the broader context? How is it significant? Does it stand out? And if so, why? In research, we ask ourselves these questions every day.

Best practices. In every industry, there are established best practices that set parameters on what can and can't be done. Grammar rules guide the writer. Length of interview and scales guide the researcher. In every

industry, just as in art and science, there are rules – whether written or unwritten – that help define the space and keep the majority of participants operating inside the walls.

Break the rules

But what about the notion of breaking those walls? That's a practice from the art and literature world that is far more extensively explored and accepted than it is in the research world. Artists are given permission to break the rules. Researchers refrain. So what would it look like if that weren't always the case?

If you've studied art history in any detail, you may be familiar with the background of Pablo Picasso.

In short, Picasso wasn't always Picasso. He was not painting distorted, cubist works fresh out of primary school. Instead, it was the opposite. Prior to his cubism period later in life – for which he is most famous – Picasso mastered the basics. He was a talented and accomplished artist in the classical sense. He learned the rules and excelled at them. If you held up some of Picasso's early works, the layperson would likely have a hard time distinguishing any of his oil paintings of portraits and landscapes and mothers and children from any other run-of-the-mill artist at the time.

That's not a bad thing.

Picasso spent years honing his craft and learning the foundation of what makes art art. His eventual mastery of that very fact gave him the credibility (and freedom) to ultimately explore something a little more non-traditional. One of Picasso's famous quotes is, "Learn the rules like a pro, so you can break them like an artist." And that "break" is where his brilliance was most impactful.

In research, we love to create our walls.

There are rules that we as the research team are taught to keep hidden from the respondent. We lurk behind two-way mirrors in dark backrooms. We join and observe Zoom interviews anonymously – double-checking our camera is off and our Zoom name is set to "observer" just in case a respondent may somehow know we're there. We monitor our quant surveys quietly online, checking stats via online dashboards – being careful never to disrupt any respondent experience.

When positioned like this, these "rules" sound questionable at best. But we're not being deceitful. These guardrails all ladder up to the broader set of research best practices. Perhaps more so than in most other industries, everything we do in market research is done in the name of unbiased, good research. But in the name of that good research, we've constructed barriers upon barriers to keep us separated from the very people we want to learn from, ideate with and ultimately serve.

In literature, TV, movies, etc., the fourth wall is a performance convention in which an invisible, imaginary wall separates characters from the audience. While the audience can see through this wall, the convention assumes that the characters cannot.

In research, we always want "research that doesn't feel like research." But how often does that happen? How often is a respondent seemingly unaware that they are part of a market research study – truly living blissfully within that "fourth wall" trope? Therefore, in certain scenarios, it may be worth asking yourself and your team: Is it time to break the fourth wall of research?

When breaking the fourth wall is done in the right setting and done well, it's extremely effective. In literature, movies and television, breaking the fourth wall is an effective technique used to engage, inform and connect. In the context of research that can look like:

Engage. When audiences understand that their words/ideas will be heard firsthand by a member of the client/brand they care about or use frequently, it becomes a powerful cycle

of engagement and well thought-out feedback from participants.

Inform. Giving an audience privileged information and/or letting them in on a "secret" can help foster creativity, provide appropriate context and spur idea generation. Hearing this information directly from a brand or client team can be powerful for respondents.

Connect. Building a heightened connection with an audience can pay dividends in the long run. In research, it helps strengthen the consumer-brand bond and instill trust that a company is actively engaging in efforts to understand (and react to) their customers' points of view.

Interact directly

As part of the qualitative team at Burke, Inc., we run a methodology of large group workshops called Side by Sides. In this methodology, client teams are asked to interact directly with consumers. The direct, firsthand engagement with respondents is intended to increase transparency, deepen immersion and act as a catalyst for learning and applicability.

When utilized, breaking the fourth wall of research can mean that client/brand research teams play any (or all) of the following roles depending on the scenario:

The direct, firsthand engagement with respondents is intended to increase transparency, deepen immersion and act as a catalyst for learning and applicability.

Group facilitator. Client researchers, brand managers or marketers can lead the conversation and transparently facilitate a "real" conversation with respondents. The moderator takes a back seat and spurs discussion or plays the role of color commentator.

Ask the expert. A moderator runs the group or session but the member of the client/brand research team has a seat at the table right next to respondents. As the conversation unfolds, participants are encouraged to question and collaborate with the client/brand expert who is sitting right next to them.

Notetaker. It doesn't require active facilitation or moderation to break the fourth wall. Often, the immersion of sitting amongst consumers in the process of research is enough to effectively interpret actionability and see firsthand the thoughts, ideas, struggles and drivers of respondents.

How do you know when to break the fourth wall? It can often be most effective in instances where foundational learnings and co-creation, ideation and innovation are the priority learning objectives. We also see it used when onboarding new team members or in the process of concept and persona development. It should not be used in instances where observation is a key part of the research and/or where the presence of a client researcher may influence the reaction to certain concepts or creative that are being evaluated.

What objectives can breaking the fourth wall accomplish?

Innovation and concept development. Respondents and client/brand researchers work as a team to create or refine concepts, ideas, journeys and more.

Pre-segmentation. Researchers can see firsthand how people differ in their attitudes and behaviors to create a questionnaire inclusive of the most important variables.

- **Persona development.** Test hypotheses about attitudinal or behavioral similarities and differences that define strategic targets to illuminate segments.
- **Consumer journey mapping.** Build activities that allow the whole team (supplier, client and participant) to observe and probe the path to purchase or the sequence of a set of behaviors.
- **Insight discovery and validation.** Explore and vet hypothesized tensions to inform innovation platforms, communication strategies, sales decks and more.
- **Food sampling and sensory exploration.** Product sampling and guided sensory feedback.

Two end goals

What is the ultimate benefit and unique value that breaking the fourth wall can bring? Being present, transparent and actively engaged in consumer research serves two end goals.

First, it is the path of least resistance to truly getting to know your consumers. With client/brand teams on the ground and in the trenches of research with respondents, they experience the needs of their consumer base firsthand, rather than through a secondary report. Want to get closer to your consumer? Sit right next to them. Literally.

Second, closing the feedback loop is powerful with respondents. Consumers want to know that they're being heard, that their time, opinions and feedback are not being shouted into a void and that they truly get a chance to impact the brands that they love and use every day. Seeing the presence of someone from a particular client/brand team lends credibility to their research experience and elicits meaningful input.

Over the years, we've seen the notion of "breaking the fourth wall" take a number of forms. For some companies, it means C-suite executives having a conversation directly across the table from their customers. For others, it's brand managers and insights teams implementing these types of immersive, firsthand experiences as part of yearly development plans.

Many of us in research have spent years learning the basics. We understand the guardrails in place and have mastered the foundations of our industry. But now – fresh off a period of massive disruption – it may be time to consider breaking your research wall. Lean into something new, something dynamic and immersive. Meet your customers face-to-face. Tell them your name. Shake their hand.

Tear down that wall.

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●●● brand research

The death of brands? Or new life?

How good research can help resolve the brand purpose conundrum

| By James Forr

snapshot

Thoughts on the value of understanding consumers' views of corporate social responsibility efforts.

The heavyweights of marketing and branding love to battle over brand purpose. How should a brand communicate its purpose? How much do consumers care? How can we measure the impact on the bottom line?

In the red corner, Byron Sharp, who warns that purpose will be "the death of brands." In the blue corner, Peter Field, who labels such criticism "hysterical." In a Marketing Week column this summer ("How bad research underpins the social purpose marketing debate"), Andrew Tenzer unleashed another buzzworthy haymaker, suggesting no reasonable person who looks at "the right kind of evidence" could possibly support purpose marketing.

However, what "the right kind of evidence" is, how best to gather it and how to interpret it remains unclear. Marketers could bring added focus to the discussion by thinking more broadly about the purpose of purpose and thinking more deeply about the role of research.

Tenzer argues that the proof, such as it is, for the value of purpose emerges from studies like one conducted by Accenture in which 30,000 consumers in 35 countries were asked whether they agreed or disagreed with a set of statements. For example:

- 62% of consumers said their purchasing decisions are influenced by a company's ethical values and authenticity;
- 74% crave transparency into how companies source their products, ensure safe working conditions and their stance on important issues; and
- 62% want companies to take a stand on social, cultural, environmental and political issues close to their hearts.

Sounds lovely, but as Tenzer points out, this is cupcake research – tantalizing in appearance but devoid of substance. At most, these results tell us a lot of people would like to think their decisions are influenced by a

company's social values but here, as in so many aspects of life, the say-do gap is yawning. There is no proof this is how consumers actually behave.

Tenzer's antidote to this flawed research is a dose of less-flawed research – asking consumers to check off which of 13 drivers are relevant to them when choosing a product or brand. Through this lens, sustainability and social issues recede into insignificance. "Value for money (81%), reliability (67%) and product/service quality (66%) are always the most important factors," Tenzer claims.

It is hard to know what to make of this. Tenzer's research refutes the dubious Accenture work, which makes it sound as if consumers are squirrelled away investigating which brand of toothpaste is doing the most to save the puffins. Indeed, the in-depth qualitative interviews our firm has conducted about brand meaning over the last 25 years corroborate what Tenzer has found – for most people most of the time, a brand's stance on social issues or its stated commitment to the environment are irrelevant. We sit with people for 90 minutes discussing why they gravitate toward certain brands and purpose-related issues are seldom mentioned, even in passing.

However, it is not terribly insightful to declare, as Tenzer does, that people just want products and services that are affordable and functional. That is the lowest bar imaginable; of course they want that. However, consumers also gravitate toward products and brands that help them feel like good parents, feel successful, avoid shame, show off, feel like part of a community or continue traditions. These motivations might not appear in a survey and if they did, they are largely unconscious, so consumers would tend to underestimate their influence. We often don't know why we do the things we do, which is why psychologists roam the earth.

While Tenzer's work does establish that consumers typically are not consciously thinking about brand purpose when they load up their shopping cart, we need to know more. Are consumers ignoring purpose because it is inherently irrelevant to them? Is it because brands generally do a poor job of making their purpose meaningful? Are there deeper emotional levers marketers could pull to better fuse brand and purpose – possibly in ways consumers wouldn't even be aware of?

These are critical questions because shareholders increasingly are demanding that companies establish a purpose and support it with robust environmental, social and governance (ESG) practices. This requires linking purpose directly to the bottom line, not just making charitable donations or issuing transparently self-serving messages supporting the cause du jour. Therefore, research should be more than a snapshot that captures the current limitations of purpose. It also must provide a north star to guide brands toward a better path forward.

Discipline and creativity

Brand purpose can provide a point of differentiation and a critical competitive advantage. However, that requires a degree of discipline and creativity that is almost as rare as a bear with feathers.

Using purpose as a focus of messaging (in the for-profit world, at least) works extremely well for the small set of brands that were built with purpose as their strategic cornerstone. Volvo wouldn't be Volvo without its safety-centric purpose. Patagonia wouldn't be Patagonia without its commitment to the environment. Fenty wouldn't be Fenty without inclusion as part of its story. Their histories bless these brands' purpose-based efforts with a halo of authenticity.

However, brands not created with purpose in their chromosomes often fall back on lazy, follow-the-leader applications of purpose that, at best, merely do no harm. In other words, turning your logo into a rainbow flag for Pride month may be commendable but it offers a minimal level of support and is unlikely to help your brand when practically every other brand in practically every other category is doing something similar.

For these brands, purpose-based messaging works best when it directly enhances perceptions of a key product attribute, a functional benefit or a psychological benefit that consumers derive from using the brand.

This is harder than it sounds and few brands do it well. One exemplar is Dawn dishwashing detergent. Look at Dawn's bottle – there is a little duckling on the front. No context is provided beyond a spare explanation on the back in font so small it can only be read by plankton. But if you have an animal-loving child, her demand that you buy the dish soap with the cute duckling on the label naturally piques your curiosity.

A quick Google search reveals that animal rescue organizations found Dawn particularly effective at cleaning birds harmed by the Exxon Valdez oil spill in 1989. It was all over the news at the time. Since then, the brand wisely has embraced that unplanned functionality of its product and now boasts on its website that it has helped clean more than 150,000 marine birds and other mammals in North America.

The brand's purpose of helping wildlife in peril reinforces perceptions of two key functional benefits – Dawn's cleaning power and, ironically, its gentleness on your skin. If you asked consumers to check off the list of reasons they buy Dawn, the brand's commitment to the environment surely would rank far lower than value and effectiveness but that environmental commitment is nevertheless important because it provides a subtle nudge.

Consumers are not sitting in basement laboratories conducting effectiveness tests and cross-cutting price comparisons on 18 different brands of dish soap. How do they know Dawn is more effective or a better value than any other brand? They'll often tell you in research, "I ask my friends" but please, when was the last time you discussed dish soap with your friends? For those who know about Dawn's purpose, however, the story of the birds serves as a heuristic – a mental shortcut – that tells them all they need to know about the product's quality. It may not be the reason they buy Dawn, per se, but it is a relevant proof point and has become part of the constellation of meaning that surrounds the brand.

Lifebuoy's "Help a Child Reach 5" campaign is a major part of that brand's purpose, which is to change the hygiene behavior of consumers around the world, particularly in developing nations where child mortality is high. The purpose is supported by powerful, emotionally moving communication and partnerships with schools and others on the ground. Importantly, this campaign also addresses a key functional benefit of the product, which is that it keeps your hands clean. Every brand makes that claim in one way or another – if soap didn't clean, it wouldn't be soap. But Lifebuoy's higher purpose has imbued that obvious, commoditized benefit with an emotional salience that distinguishes it in the category.

Dove's purpose, on the other hand, differentiates at a more directly emotional level – the pride women feel when they look good, in whatever way that person defines "looking good." The brand's "Campaign for Real Beauty" brought poignancy to this emotional benefit by dramatizing the corrosive social pressure women feel to present an ideal appearance and championing the notion that every woman is unique and beautiful in her own way.

Falls short

To be clear, these success stories are the exceptions. Much of purpose marketing falls short because it lacks a clear connection between the message being delivered and the brand experience. At its worst, a brand's purpose message can disrupt the experience that consumers are seeking.

Tenzer has pointed to Carlsberg's commitment to helping the World Wildlife Fund (WWF) restore seagrass along the U.K. coastline as one particularly awkward mash-up. Drinking a Carlsberg is nice. Helping the WWF is nice. But they are two utterly unrelated experiences, so most consumers probably just scratch their heads and move on.

That doesn't necessarily mean Carlsberg shouldn't aid the WWF. Such efforts are laudable and much needed and also may help the company in other ways, such as providing a greater sense of meaning to employees. However, it falls flat as a consumer-facing campaign because it doesn't enhance the existing meaning of the brand – not at a functional level, not at an emotional level.

Moreover, the partnership with the WWF is essentially charity, an appendage, rather than part of a competitive strategy. If times get tough, it would be easier for Carlsberg to cut support to the WWF than it would be for Dawn to stop helping animal rescue organizations, given the centrality of Dawn's commitment to animal welfare to its positioning. A good deed is not the same as a true brand purpose.

That partnership may not be helping Carlsberg much but it isn't necessarily damaging the brand beyond a largely wasted advertising spend. In some cases, though, marketing has backfired badly when brands have grown a little too enamored of their own righteousness. Starbucks' infamous 2015 "Race Together" campaign is a notorious example. The brand learned the hard way that customers had no interest in a deep discussion with their harried baristas about systemic racism. People just want to grab their Caramel Macchiatos and get their bleary-eyed selves to the office. The effort, though well-intentioned, made Starbucks seem out of touch and almost selfish in what it was demanding of its consumers, not to mention its frontline employees.

Work best under the hood

In the context of developing new products and services, purpose may work best from under the hood. Mastercard's purpose is "to connect and power an inclusive digital economy that benefits everyone." That has driven innovations such as accessible payment card systems for partially sighted people and a program that lets trans and nonbinary people use a self-selected first name. Consumers don't adopt these innovations because they are consciously choosing to support Mastercard's purpose. They don't even know what that purpose is. Rather, they adopt the innovations because Mastercard is making their lives easier and helping them feel respected, which forges an emotional connection with the brand.

In collaboration with Wharton's Zicklin Center for Business Ethics Research, our firm has conducted qualitative ZMET metaphor elicitation interviews with corporate executives and investors around the world, seeking to understand the climate for sustainability inside their organizations. A real estate investor told us how purpose led his firm to install fresh-food vending machines in its apartment complexes. Not only were the machines popular, they also drove second-order benefits in the way of greater tenant satisfaction, higher rental rates and lower maintenance costs. No tenant would tell a researcher that she is renewing her lease because of her landlord's social purpose, although she might say she is staying because the landlord provides valuable amenities or cares for the well-being of its tenants.

Both of these cases show that purpose need not come at the expense of profit. In fact, purpose thoughtfully applied can open up new business opportunities and bolster the bottom line.

Research can clarify and inspire

These examples suggest purpose marketing is most effective as part of a larger corporate or brand strategy. Well-designed research with consumers (and other stakeholders) can help clarify that strategy and also can inspire messaging and innovations that align with the strategy.

Marketers can use upstream consumer research to produce a map of what their brand represents in the minds of consumers – from the most important product attributes all the way up to emotional end benefits. This includes understanding the "jobs to be done" that the brand performs for consumers.

Surveys don't cut it at this stage because they can only examine a brand piece-by-piece; it is much harder for quant research to reveal how all those pieces interconnect in a consumer's mind. It is no different from how a psychologist understands a patient. The psychologist discovers the full picture by asking open-ended questions and listening to your story. The paperwork you fill out in the waiting room only scratches the surface – that is just the beginning, not the end. Similarly, deep qualitative research can yield the understanding required for deep thinking. These insights are valuable in many ways, not the least of which is as a muse for the creation of fresh ideas about how purpose can dovetail with existing elements of the brand experience.

Various methodologies, including observational techniques or IDIs, can reveal consumers' unmet functional and emotional needs – insights which brands can funnel through the filter of purpose to create products and services that meet those needs. Sometimes the best innovation ideas emerge from understanding segments of the population that are overlooked by brands in your category. For example, OXO kitchen gadgets initially were designed to make cooking easier for people with arthritis, after the founder watched his wife struggle to peel an apple. Turns out they make cooking easier for everyone. Today, OXO is the market leader, a success story that began with a strategically focused brand purpose.

Both quant and qual, then, can play various roles further downstream – optimizing innovations, evaluating messaging, gauging perceptions of innovative and more environmentally responsible packaging and, ultimately, assessing the implicit and explicit effect of these purpose-driven ideas on brand perceptions.

This exposes the limits of Tenzer's research. When consumers state that a brand's purpose didn't influence their purchase decision, that can't always be taken as gospel. Maybe it didn't influence them or maybe it did and they just didn't know it. Do you have an OXO tool in your kitchen? Did you realize that you purchased it, indirectly, because of OXOs original social purpose?

When purpose is executed strategically and executed well, it can function like the frame of a house. No one buys a house because of its frame. You can't see it. Real estate agents don't talk about it. But all the things you love about a house are built upon or within that frame. Purpose can work that way, too, as unseen structure behind successful messaging and innovation.

When part of a broader strategy, purpose marketing also extends to internal communication, which is another area where a deep understanding of the audience is imperative. One of our clients asked us to meet with managers and top-performing employees to understand how they felt about the corporation's newly announced purpose. This was a company that had long prided itself on its hypercompetitive ethos. The old-school Type-A employees felt alienated by the new purpose because it seemed like a radical departure from the win-at-all-costs culture in which they thrived. Others welcomed a break from the past but they doubted whether the C-suite was truly committed to this new purpose, given that performance incentives were still aligned solely with financial success. In other words, everyone was unhappy. However, the research revealed several areas of overlap between the psychology of the two groups. Those points of overlap were like little shafts of light that pierced the fog and offered ways to talk about purpose so that both groups could buy in.

One also can imagine non-traditional uses of research – for example, speaking with government officials or leading citizens in towns where a company hosts its manufacturing facilities. If purpose is part of the company's strategy, it should live those values in its interactions with all its stakeholders, including members of the communities where it operates.

If purpose is part of the company's strategy, it should live those values in its interactions with all its stakeholders, including members of the communities where it operates.

Use purpose to drive profit

In its most watery state, purpose marketing takes the shape of virtue-signaling and formulaic fluff. But well-designed research can help organizations use purpose to drive profit via personally relevant products, services, messages and experiences that are all closely integrated with competitive strategy. Purpose need not be the death of brands. In fact, when thoughtfully employed, purpose can breathe life into a brand or an entire organization.

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brand research

Look beyond the low-hanging fruit

Reinventing segmentation to drive long-term brand growth

| By Luis Molina

snapshot

Luis Molina offers four steps toward a more modern and effective approach to segmentation.

Today, marketers are increasingly segmenting to target small groups of consumers for short-term gains. It makes complete sense. To peel away shoppers from other brands, marketers focus on narrower and narrower slices of the population. As a result, consumers now expect almost every product to be made and marketed "just for them" – from features to packaging to store placement. If SKUs were any more customized, they would be monogrammed with the buyer's initials.

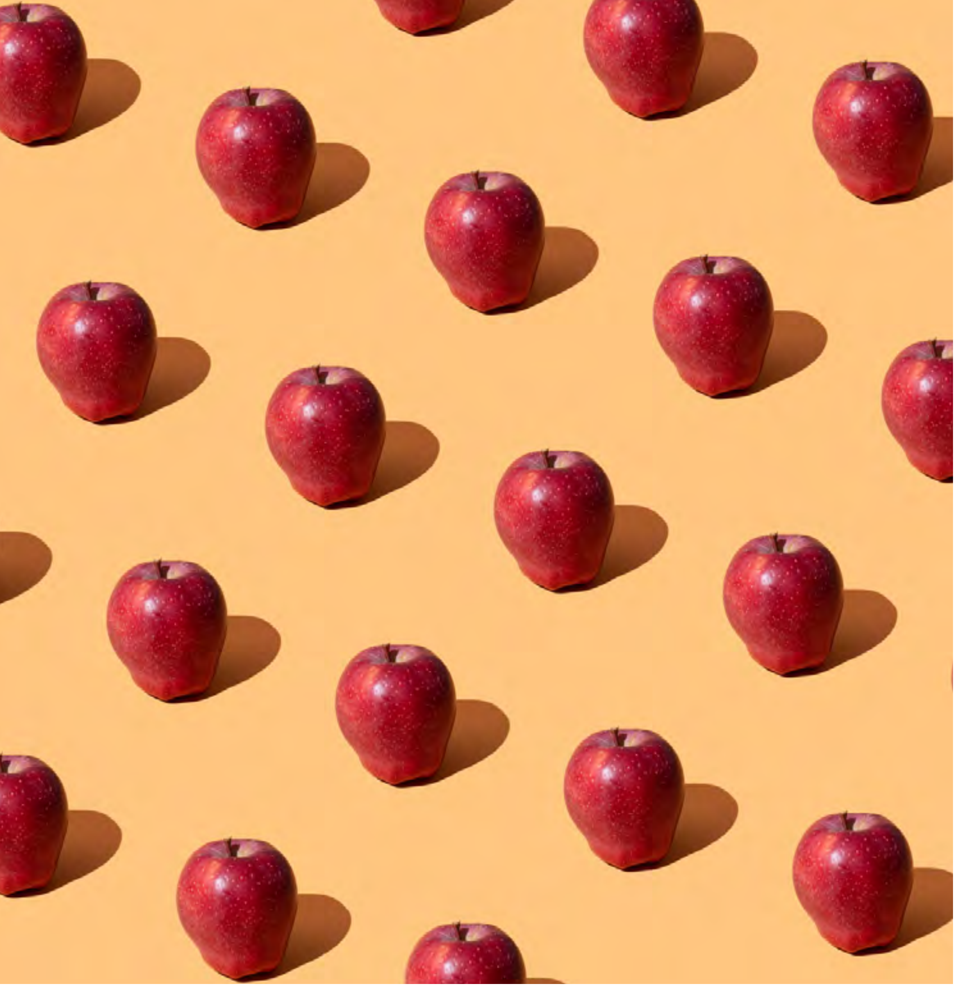
But for brands, there is a rub with this approach – and it is no small concern.

"Narrowcast" targeting by itself does not build a healthy brand in the long term. Why? Because you need to develop a rich funnel of future buyers before you start drilling down and matching specific targets to compatible brands.

In fact, the key to building long-term success is to achieve greater mental availability for your brand across a wider array of occasions and people. Marketers must integrate KPIs such as brand performance into their segmentation methodologies to assess how well a brand fits against key segment and occasion needs. We can then use these to determine not only among whom and when the brand has the best "right to play" but also identify opportunities where it can penetrate the consideration set further.

In the words of Mark Ritson – a leading thinker in marketing and brand management – "The only way to achieve sustainable … growth is to balance targeted activation with brand-building aimed at the whole market – it's not either-or."[1]

Activating this kind of two-pronged approach to segmentation – merging short- and long-term focuses – requires innovative thinking and a continuous program of data assessment and refreshing. Anything less will create a costly imbalance and lead to challenges that no brand wants to deal with.



A world turned upside down

The dangers of doing traditional segmentation and targeting poorly are right in front of us at this moment. Retailers of every stripe, from Costco to Target, are currently going through their version of “Stranger Things,” living in a world turned upside down. Despite inflation and double-digit cost increases, retailers are offering deep discounts in an all-out effort to clear the inventory overflowing in their stores and distribution centers.[2] These surpluses are decimating retailers’ working capital and share prices, with no end in sight.

In this era of big data and real-time dashboards, how can retailers and brands have misunderstood their customers’ desires in such a big way?

Marketers and researchers have become heavily focused on understanding and targeting people based on near-term information – current purchases, social posts, comments and what’s trending. But these data streams leave out key information and perspectives essential for decision making. And they focus on short-term hits rather than broader, sustained growth. Selling mass quantities of one or two SKUs to narrowly defined consumer groups will not be enough to drive big-name brand success over the course of three, five or 10 years.

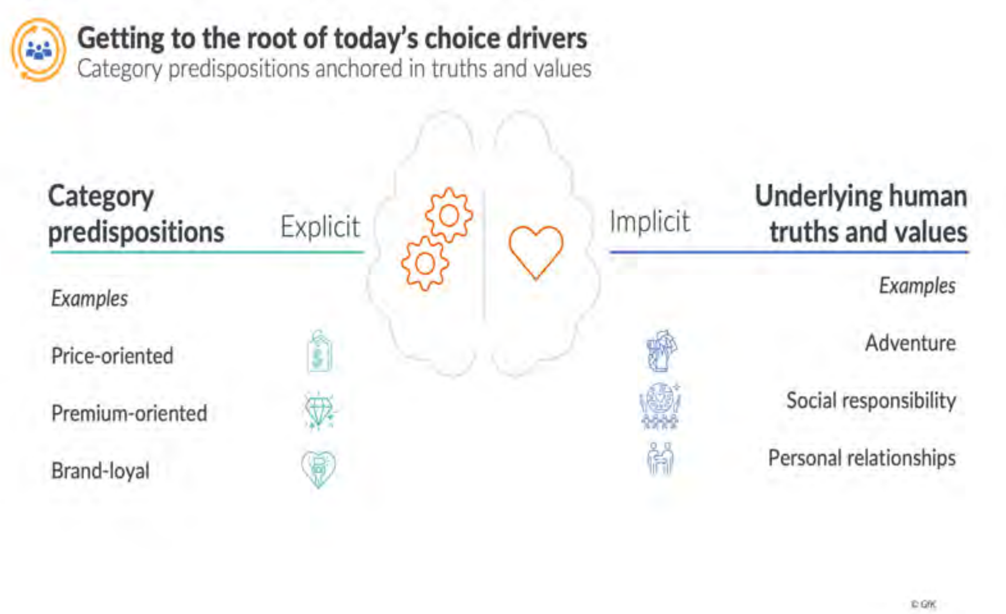
The good news is that, when applied correctly, the building blocks of segmentation give us essential learning that we can leverage to take on that bigger brand picture. Done well, we can play both sides of the game, using some of the same information to achieve narrow-targeting wins and longer-term brand acceleration.

So how do we get segmentation right in this age of increasingly complex consumers and almost unlimited brand interactions? First, we need to segment more effectively – and then reach across those groups to find commonalities for broader product and marketing outreach. Here are four essential steps for getting this new approach to segmentation right.

1. Create a holistic understanding of long-term choice drivers by segment

In addition to understanding the traditional ways we segment and target – such as defining consumers based on their category-specific leanings and behaviors (e.g., more price-conscious, more quality-oriented, want advanced features, want basic functionality) – we also need to identify consumers’ general predispositions to brand choices. To begin with, we must zero-in on peoples’ personal values and life principles. From being adventuresome to valuing personal relationships

Figure 1



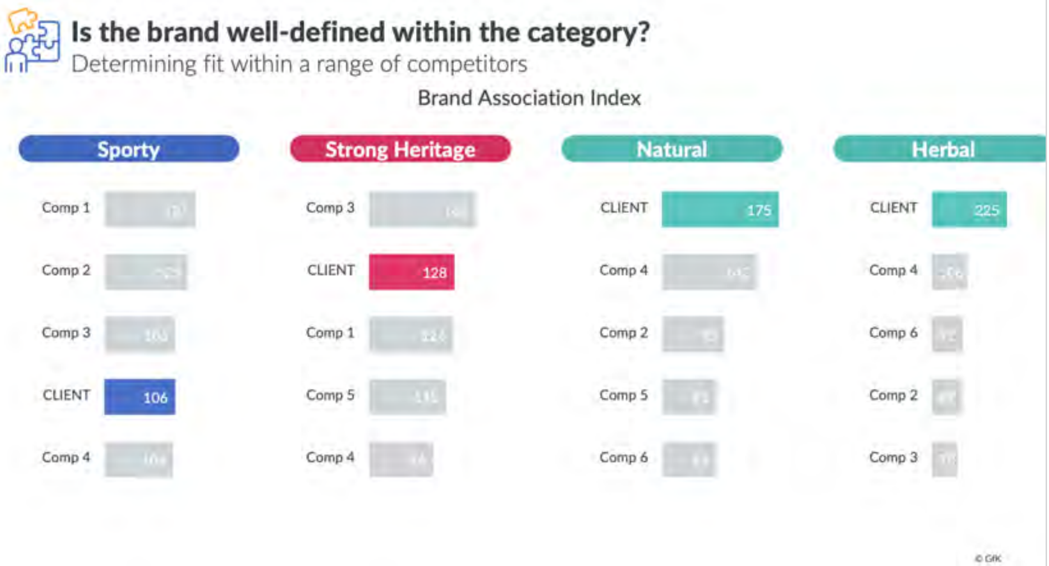
to placing emphasis on things like social responsibility, values implicitly drive brand choices (Figure 1).

According to GfK Consumer Life – which interviews over 30,000 people in 27 different countries annually – over three-fifths of global consumers indicate that they "only buy products and services that appeal to their beliefs or ideals."[3] Moreover, other GfK research shows that consumers are more likely to pay a premium for "a brand that has strong and clear values they identify with."

What can brands learn from these findings? The brands consumers like and buy are not just driven by how well they deliver on category-specific needs. Increasingly, brands must also consider consumers' broader sensibilities. A successful segmentation will take these implicit choice drivers into account.

Toyota is an example of brand that has been able to successfully leverage values-based marketing through its "Adventure Awaits" campaign, which shows how its SUVs can help bring more adventurous experiences – either actual or vicarious – to its customers' lives, thus tapping into an essential value that defines many people.

Figure 2



2. Define the situational factors affecting brand choice in the moment of truth

While people have overarching principles that guide many of their choices, the specific situations in which they find themselves also influence their decisions. For instance, consumers who are typically defined by health-oriented attitudes – eating foods that are nutritious, for example – may still pick options that are more indulgent in certain circumstances. When surrounded by friends, or at a special event, their values may take a back seat, if only for a minute or an hour or a day.

An important lens for viewing how brands and consumers connect (or not) is Jobs to Be Done. It is imperative to understand consumers' underlying goals (or jobs) when they are shopping or consuming, with most falling into three key categories:

Functional – e.g., healthy, close at hand, inexpensive
Emotional – e.g., nostalgic, relaxing, stimulating
Social – e.g., connecting, celebrating, self-care

In addition to traditional people-oriented segmentations, studies can also identify segments of occasions (often called need states) that operate at the moment of consumption. (Examples from food and beverage are Pick Me Up or Treat Myself.) Understanding how consumer needs may vary according to the situational context is a critical ingredient that helps marketers understand opportunities to increase the mental availability of their brand.

3. Understand how your brand fits in the competitive landscape

To be truly actionable, a segmentation should also assess how a brand compares to its competition against a set of key customer needs. In Figure 2, we have identified four important requirements that our client – a natural remedy – must focus on in order to maximal-

Figure 3

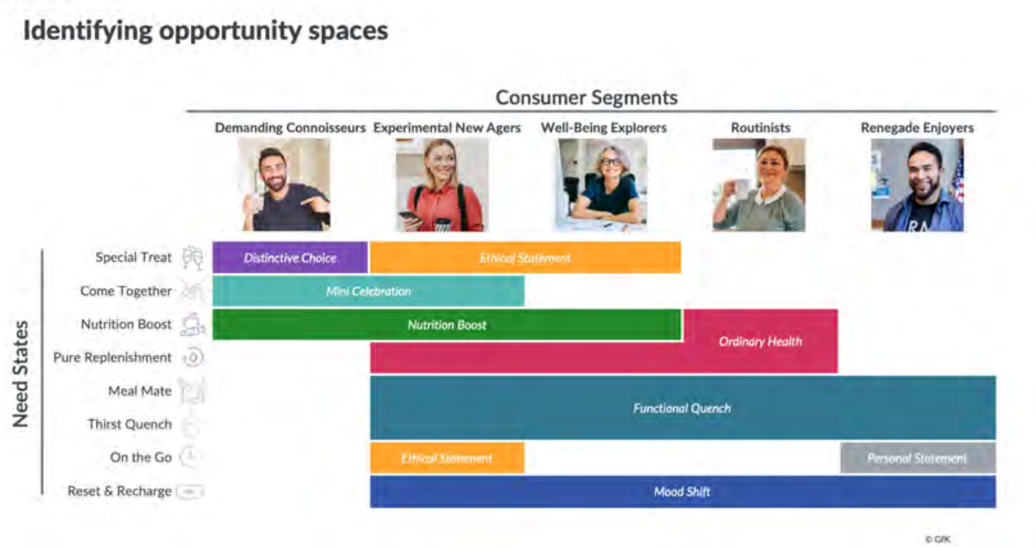
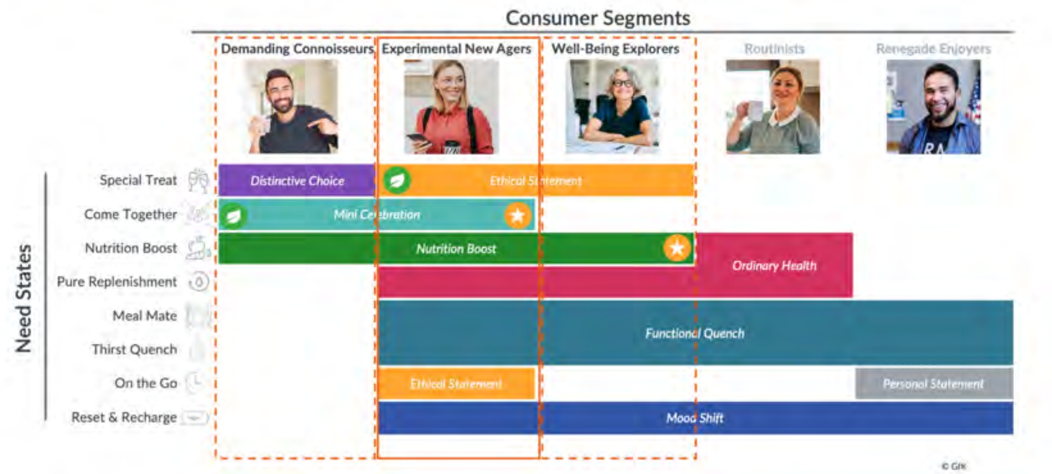


Figure 4

Maximizing positive impact



ly appeal to important target segments. What we are seeing is that the brand is performing only average on the first (and most important) key need (Sporty); and while it is doing much better on Strong Heritage, our brand still trails the category leader by a significant margin. On the last two attributes, though, the client's brand is clearly the best-in-class.

In fact, the attributes on which the brand performed so well are key to one specific target segment – which tells us that the client should maintain its positioning as a natural and herbal brand. Secondly, because the first two attributes were really critical to tapping into the most lucrative segments, our analysis gave them a very specific roadmap for penetrating these segments.

Ultimately, the goal is to remind as many consumers as possible that the brand exists and that it can meet the requirements of the moment. By focusing on the top of the marketing funnel in this way, we are giving our brand greater odds of being considered and tried in different moments, and of ultimately generating a stronger base of occasional and even loyal users.

4. Quantify how brands match up with consumers over the long term

Now that we have learned to create more effective segmentations – ones that take into consideration growing consumer complexity as well as the important situational contexts – let's switch gears and talk about how we can leverage this learning to attain greater growth for our brands over the long term as well.

Segmentations usually accentuate differences but here we will look across the market for similarities and common threads that connect people. The goal: to build a brand that is more widely accepted, resonates and positively impacts people.

The first step is to cross the consumer segments with the situational contexts to identify your brand's opportunity (or demand) spaces. Examining your brand's positive or negative impact across both consumer types well as need states helps us both synthesize a lot of information and identify ways to appeal to different consumer segments at the same time.

In Figure 3 we see an example of what this type of intersection looks like based on non-alcoholic beverages. Across the top we have the consumer segments, which are defined on broad category and non-category attitudes and personal values. And along the side we have the beverage need states, which boil down different consumption occasions into focused needs, like having a treat or having a moment of connection with others.

When we cross these two systems together, we can group some of the intersections into common themes. For example, when choosing beverages for a Special Treat, both Experimental New Agers and Well-Being Explorers (Figure 4) tell us that making an ethical statement about what they choose is operative for them in those situations.

This crossing of segments with need states is really wonderful in its own right, in that it helps us to synthesize a lot of information in one view. However, leveraging commonalities across segments or need states that are otherwise distinct also gives us some tactical advantages to help us grow our brand beyond any core target segments or need states that may have been identified from earlier opportunity-sizing. In this case, Experimental New Agers were identified as a priority segment based on value modeling, while Well-Being Explorers were considered secondary. But knowing that Ethical Moments were common to both gave us an entrée to talking to and ultimately appealing to Well-Being Explorers.

Close off your brand

Segmentation – the foundational approach for marketers since the dawn of consumer research – often accentuates differences and can inadvertently close off your brand to many consumers and situations. In this new approach, we explored 1) how to quantify today's complex consumers through sophisticated segmentation and 2) use segmentation to look across the market for similarities and common threads that connect people. Intersecting consumer mind-sets with situational contexts will identify new opportunities for growth in different ways. It will reveal new potential positioning platforms and commonalities to appeal to a greater range of consumers across more occasions over time.

Luis Molina is vice president of consumer insights at GfK. He can be reached at luis.molina@gfk.com.

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●●● b2b research

Think different

How to become the most valued member of the product team

| By Chris Wirthwein

snapshot

In B2B industries where so many companies and offerings seem the same, using insights to strive for differentiation can be a key driver of growth.

What's the first and most important task for any B2B marketing team? For my money, it's achieving differentiation. If true, then it makes sense that the most valued member of a product team is one who delivers ideas to achieve this.

Allow me to illustrate with an exercise I used to open my presentation at the Chicago Quirk's Event earlier this year. To the group, I displayed a large image on the screen – a group of pencils: 20 or so black and a single yellow-orange one. The slide contained no words, just the photo. I then posed two questions. First: "Which pencil is best?" From the facial expressions, the crowd appeared baffled, confused, even a little annoyed. Of course they were! Question two let them off the hook: "Which pencil is different?" Instant makeover! Smiles, a few chuckles – and point made. Yes, all people understand, react to and are instantly attracted to what is different!

So, how can insights professionals become the most valued member of a B2B product team?

- Think like a product strategist: think differentiation
- Deliver strategic, differentiation-enabling insights to the team
- Bring differentiation ideas to the table

How important is differentiation in marketing? Listen to what others have to say on our subject:

"*Humans are wired to detect irregular things.*" John Hallward, insights professional and author of "Gimme! The Human Nature of Successful Marketing"

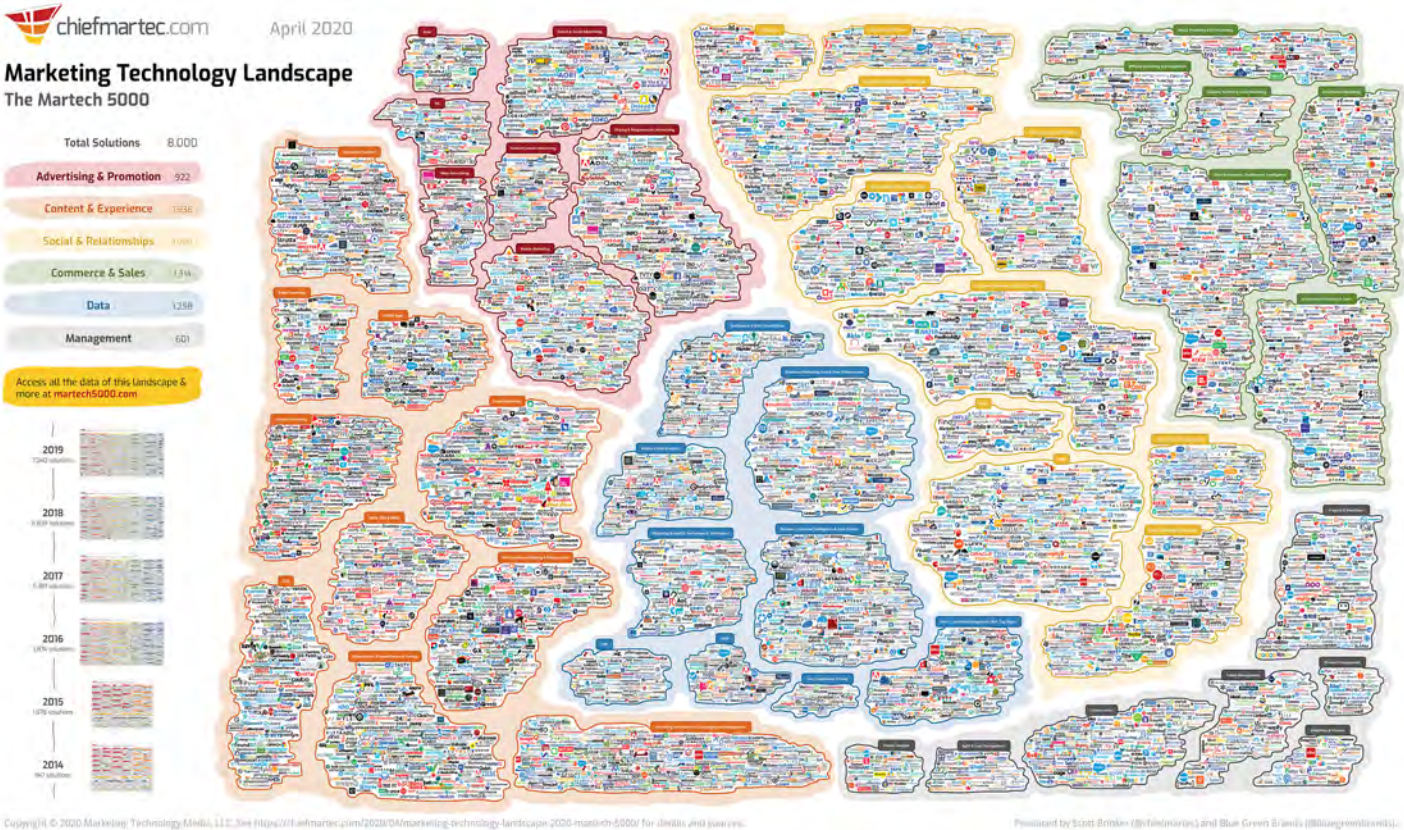

Figure 1: Which of these 8,000 software packages is the best? Who knows? A B2B buyer will take a look at a few and purchase one that delivers utility for the job at hand. (chiefmartec.com)

"We don't pay attention to boring things." John Medina, neuroscientist and author of "Brain Rules"

"Compete to be unique." (Stop competing to be the best.) Michael Porter, Harvard University, creator of the Five Forces Model of competition

"The way to think about differentiation is not as an offspring of competition but as an escape from competition altogether." Youngme Moon, Harvard University, author of "Different – Escaping the Competitive Herd"

And why is being different so important? Because when your product is perceived as being the same as others, no one will notice. Take a look at Figure 1. It shows the crowded B2B category of marketing technology software. Which one is best? Who knows!? No buyer will ever take the time to find out. The only hope for any of these products to win is to first, be different. Same likely goes for the category you're in. But it wasn't always this way.

In the past, people had lots of time on their hands. What they didn't have were lots of choices. Henry Ford reportedly said in the early 1900s, "You can get any color of automobile you want, as long as you choose black." Funny, perhaps, but true. Ford's purchasing agents surely met more of the same when searching for automobile paint, bearings and other industrial goods to satisfy the engineering specs of the Model T. That period could be summed up as an era of unlimited time and limited choices. And about all a marketer had to do to make a sale was interrupt the buyer. Every horse and buggy owner could instantly perceive the difference and superiority of an automobile. But things changed.

After World War II, the world burst forth with innovation, production efficiencies and an abundance of choices. Making the sale required marketers to do more than simply interrupt. They had to persuade, as in: "Our widget is better than theirs." And what happened to the quaint concept of unlimited time and limited choices? Gone forever. Replaced by a world of limited time and virtually unlimited choices. It has intensified to this day.

To cope with this, today's B2B buyers gravitate to a different way of purchasing. They buy products to perform a task. Utility of a product – its fitness for a purpose – has become a dominant buying paradigm. Effective B2B strategists today understand that above all else, winning in complex, crowded markets requires an unswerving mind-set for establishing perceived differentiation and product utility in the marketplace.

Fail to deliver

I don't need to tell you how important insights are to the success of B2B marketing. Yet I've seen plenty of market research studies fail to deliver on this. Why? Because they did not deliver actionable insights – information instructing marketing and creative teams on how to express the product's differentiation and utility to the audience. In my estimation, the most valuable insights center on three Cs: company, customer and competitor(s).

Company

This includes findings related to the product (or service), the corporation (and company brand) and what in these two areas are or could be viewed as differentiating. You may not think of this type of internal investigation as insights work but I encourage you to do so. In my experience, differentiating ideas and strategies can be discovered inside the company. To that end, learn how the company discovers, makes, sells and supports its products to users and sellers. Understand the way the company operates – its beliefs, priorities, history and culture. Also understand that because no two companies are alike, the corporate essence and brand are often fertile hunting grounds for differentiation.

Customer

The ultimate value you can deliver here is knowledge of what customers (and prospects) care about. Do this by learning what constitutes relevance and utility in the eyes of the customer. Relevance speaks to the self-interests of your audiences. And as you know, things customers care about often don't involve our product. Keep your eyes and ears open for these. Explore bigger-picture areas before getting into details about your product.

I once learned in an in-depth interview an entirely new way in which our client's customer approached the production process in his business. Compared to others, he had flipped the situation on its ear, in essence, doing it backwards. He had his reasons. Doing it this way allowed him to stage his production to get greater efficiency from labor and capital resources. It was so simple and elegant, yet no one else had thought of it. And it just so happened that a certain unique (and overlooked) feature of our client's product provided a utility that fit ideally into his unorthodox method. In time, others adopted his innovative ways. And you can bet we emphasized this difference and utility that our client's product provided in our marketing and advertising. As for that once-obscure product feature? It became a must-have for an entire industry and led to near 100% adoption of the category.

When you know and can articulate what customers care about and what utility they seek, you'll be pointed in the right direction in the search for differentiation.

Competitor(s)

Gaining a deep understanding of the competition is something many product teams never get around to, given their multiple priorities. And so, what better way to add value than by making this an area you master? Understand what customers and non-customers think of your competitors. Learn where they're perceived as strong (different) and where they're vulnerable to your differences and utility. I also encourage you to gather insights from the perspective of your organization's people in the field – the sales and support teams. They can often be a valuable source of ideas on what makes your product different in the marketplace.

Two idea-starters

I could fill the rest of the pages in this issue with idea-starters for differentiation. I've picked out a couple from the pages of my book "Different Rules – the B2B Marketer's Guidebook to Product Differentiation" to get things going.

"Because" – the reason to believe. In the book, I discuss the problem with benefits and the surprising benefit of features, especially in B2B. But let's start with definitions. A feature is a tangible aspect of a product, something observable, provable, measurable. Examples: length, weight, specific gravity, density, color, etc. And here's the benefit of using features to differentiate: features can be proven. They therefore thus invite little to no skepticism or debate from audiences.

A benefit is a positive result – and there are two types: direct benefits and derived benefits. (Heads up: This distinction between the two is a new idea.) A direct benefit is a positive outcome that can be attributed to a feature. Example: increased durability is a direct benefit of a diamond coating placed on a cutting-tool bit. A derived benefit is an extrapolated positive outcome. Example: reduced downtime (fewer production-line stoppages) for replacing cutting-tool bits is a derived benefit resulting from durability.

The lengths that derived benefits can be taken sometimes extend to the absurd (pride, job satisfaction, greater

ROI, peace of mind, etc.). And here lies the problem: Benefits can invite and produce skepticism and debate. And why is this a problem? Because B2B purchase invariably involve efforts by the buyer to manage and reduce risk. Yet when marketers emphasize and stretch benefit claims, skepticism, debate and perceived risk go up. Sellers make derived benefit claims all the time. But inherently, sellers are biased. And buyers know this. Furthermore, derived benefits often don't differentiate. Pick a category of B2B products. How many times have you seen or heard a marketer claim "better ROI"? Hardly a differentiating claim in most categories, especially mature ones.

Now for the differentiating idea-starter: Provide a reason to believe – a "because" – for what makes your product different. And more often than not, you'll find a feature (rather than a benefit) to be a credible "because" of what makes your product different. Your "because" could be how the product was developed (an R&D story), how it's made, users' point of view (ranked

#1 by ________, etc.) and many, many more.

How important is having a "because"? Market research supplies the answer. Are you familiar with the copy machine study? In it, Harvard professors had researchers approach people in waiting in line at the library copy machine and ask one of three very specifically worded questions:

- *"Excuse me, I have five pages. May I use the Xerox machine?"* A request only; no reason
- *"Excuse me, I have five pages. May I use the Xerox machine, because I'm in a rush."* A request with a real reason
- *"Excuse me, I have five pages. May I use the Xerox machine, because I have to make copies."* A request with an immaterial reason

Results? Question 1 (request only, no reason): 60% said yes to the request. Question 2 (request with real reason): 94% said yes. Question 3 (request with immaterial reason): 94% said yes. And what's the moral of the story for marketers? Always provide a reason for what makes your product different. This study was not conducted with B2B audiences and nothing was being bought or sold but with that in mind, my advice for B2B marketers is to provide your audiences an entirely material and relevant "because."

Category as a strategic differentiator. "First," "the only," "leader" – what marketer doesn't covet these positions? Bring forward an idea that establishes one of these positions and you'll add great value to your product team. But isn't being the first or the only something that only R&D can do? And "leader" – that's market share, something the sales team does, yes? I disagree. Stay with me as I discuss category and you'll see why.

What's a category? An organizational container in the mind into which we place similar things. Think of category as a mental file folder. B2C and B2B consumers have categories for all sort of things: from energy drinks and SUVs to industrial abrasives and metal coatings. And speaking of energy drinks, don't get brand confused with category. Red Bull – that's a brand name. It "lives" in a category: energy drink. What's this have to do with differentiating ideas for B2B? This: As a marketer, you may be able to create a category that establishes your product as "first," "only" or "the leader." Examples where this has been done in B2C marketing abound. But it's much rarer in B2B.

Here's a B2B example I'm familiar with, having worked on it. Today, building codes mostly require commercial buildings to be equipped with automatic sprinklers to put out fires. Accordingly, there's a category for products like this: fire suppression. And when our agency began working in this arena, water sprinklers and the fire suppression category went together. When commercial construction audiences thought of the category, water sprinklers came to mind. And yet, our client had developed a product that put out fires without water. And this turned out to be a big thing. That's because most of the damage in commercial building fires comes from the water doused on the flames by automatic sprinklers. Commercial buildings only rarely burn to the ground. Yet insurance adjusting data shows that plenty of businesses and buildings are essentially ruined by the water from sprinklers. Our client's product had trouble breaking into the market because of the singular dominance of water sprinklers in the fire-suppression category. Yet, based on insights research we conducted, the market seemed primed for a disruptor via an idea we developed – a new category.

Our research showed that audiences had some familiarity with the problems caused by employing water to put out fires. And even when they didn't, they quickly understood and acknowledged them. But most didn't know there was any other way. Enter our idea – a new category: waterless fire suppression. Do you see the idea? It's the last syllable of the word: waterless. This one word contained the necessary relevance and utility to dramatically differentiate our client's product in the marketplace. Just by stating the category "waterless" fire suppression created a powerful impression, bringing up a question in the mind of the audience: "I wonder what's wrong with water?" There's lots more to say, but the strategy and the idea of the new category worked. You can find details of this case study in my book. What I want you to learn here is to open your mind to the possibility of creating a powerful position through a new, differentiated product category.

It pays to be different

A Harvard Business Review article, "Discovering new points of differentiation," by Ian C. MacMillan and Rita Gunther McGrath, contains this important thought and reminder: "Most profitable strategies are built on differentiation: offering customers something they value that competitors don't have."

As an insights professional, you are in a unique position to lead the charge in your product team's quest for differentiation. That's because you possess a unique combination of skills required to identify what customers "value that competitors don't have." To succeed at this: think like a product strategist – think differentiation; deliver strategic, differentiation-enabling insights to your product team; and bring differentiation ideas to the table. Stated simply: play by different rules.

Chris Wirthwein is senior director of 5MetaCom. He can be reached at cwirthwein@5metacom.com.

special advertising section

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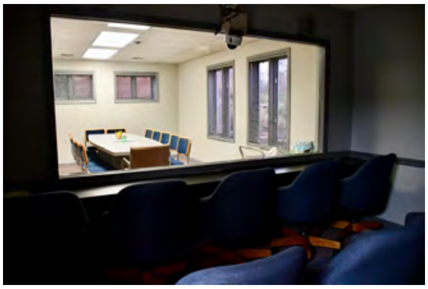

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CALENDAR OF EVENTS

●●● can't-miss activities

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

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

Insights Association will host CONVERGE on **December 6-7**. Visit 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.

IQPC will host its Global CDAO Exchange on **January 29-31**. Visit www.intelligentautomation.network/events-chiefdataexchange.

Informa Connect will host The Media Insights and Engagement Conference on **January 30-February 1** in **San Diego**. Visit informaconnect.com/media-insights/about-media-insights/.

IQPC will host its Customer Contact Week on **January 30-February 1** in **San Antonio**. Visit www.customercontactweekdigital.com/events-customercontactweekwinter.

Pharma Market Research Conference will host its event on **February 8-9** in **Newark**. Visit pharmamarketresearchconference.com/usa/.

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

The UX360 Research Summit will host its event on **February 15-16**. Visit www.ux360summit.com.

The 2023 Quirk's Event – Los Angeles will be held on **February 22-23** at the Marriott Burbank in **Los Angeles**. Visit www.thequirksevent.com.

Business & Data Intelligence Minds will host From Raw Data to Actionable Insights on **February 26-28** in **Berlin**. Visit www.business-data-intelligence-minds.eu.

IQPC will host Customer Contact Week Australia and New Zealand on **March 1-3**. Visit www.customercontactweekdigital.com/events-customercontactweek-au.

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

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

Merlien Institute will host MRMW APAC Summit 2023 on **April 18-19** in **Singapore**. Visit apac.mrmw.net.

The 2023 Quirk's Event – London will be held on **May 3-4** at the InterContinental London 02 in **London**. Visit www.thequirksevent.com.

WIRe will host the WIRexec Leadership Summit West on **May 8** in **Tabernash, Colo.** Visit www.womeninresearch.org/wirexec-leadership-summit.

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

American Marketing Association will host its Marketing and Public Policy Conference on **June 8-10** in **Arlington, Va**. Visit www.ama.org/events/academic/2023-ama-marketing-and-public-policy-conference/.

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

Merlien Institute will host its MRMW North America event on **June 14-15** in **Atlanta**. Visit na.mrmw.net.

IQPC will host its Customer Contact Week event on **June 19-22** in **Las Vegas**. Visit www.customercontactweekdigital.com/events-customercontactweek.

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

Event details as of September 23, 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.

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10 minutes with...

Justin Halle
Category and Revenue Growth Manager, Canada
BIC

"The platinum rule in sales, as opposed to the golden rule in life, is to sell onto others as they want to be sold."

What question is at the center of your job as a category and revenue growth manager?

At BIC, we bring simplicity and joy to everyday life as a leading national value brand. As category and revenue growth manager for our Canadian business at BIC, I help our team better understand what value means to consumers and how that has changed in recent years. As consumer spending becomes more constrained, and ultimately pivots to another "new normal," it is critical that we deliver the right product, in the right channel, at the right time and at the right price point.

Consumers are perceiving, backed up by report after report in the media, that their dollars are getting them less. The dollar channel shopper, which has been growing by leaps and bounds during COVID, often comes to the store with a limited basket. At the same time, some consumers find value by shifting to the club channel and bulking up with large-pack items. For our e-commerce shoppers, value often means never having to leave their home to make the trip.

Does your experience working in B2B sales influence your current role at BIC?

Early in my career, one of my sales leaders gave me the advice that I need to be at "D" while I was leading the customer through "B" and "C." I find myself using very similar approaches to storytelling today that I developed back then, supported now by more data points and hard numbers.

After spending 15 years in B2B sales, BIC is my first CPG/client role.

BIC offered me an amazing opportunity to use my sales experience to support our commercial team. Over the past three years, I've been fortunate enough to help support all three of our categories in both the U.S. and, most recently, in Canada. Hands down, moving to BIC and supporting our category development team was the best professional decision of my life.

The platinum rule in sales, as opposed to the golden rule in life, is to sell onto others as they want to be sold. When I worked in sales, I consistently put myself into the shoes of my customers, market research and brand managers alike. That mind-set gave me a set of experiences and a background that I didn't even realize I had until I stepped into my current role.

How do you see category management changing in the next five years?

For over two years, the predictable behavior has been unpredictability with uncertainty being certain. Brands launched products with activation plans that were interrupted by store closures, while others launched brands that had artificial boosts in sales that were nearly impossible to lap in year two. Category leaders will need to find new baselines and stop worrying about what happened in 2019. The average consumer has changed how they shop and, for the most part, those behaviors have stuck.