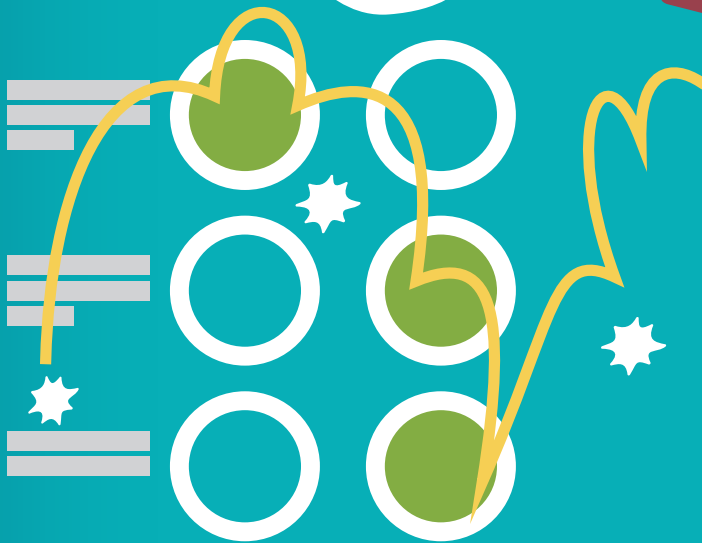


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For marketing research and insights professionals

LET'S PLAY!

How anyone can create
more playful questionnaires



PLUS

How to start your own health care panel

Why it's worth interviewing ex-customers

Should you use an expert network?

ADVERTISING SECTIONS

6 Top Low-Incidence Recruiting Companies

19 Top B2B Research Companies



Quirk's Marketing Research Review

JANUARY/FEBRUARY 2023

VOLUME XXXVII NUMBER 1

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

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



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

Steve Schlesinger, CEO of Schlesinger Group

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

Sarah Kotva, Executive Vice President of Fieldwork

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

Roben Allong, President of QRCA

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

Bob Qureshi, Managing Partner of iView London

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

Kristin Luck, President of ESOMAR

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

Melanie Courtright, CEO of Insights Association



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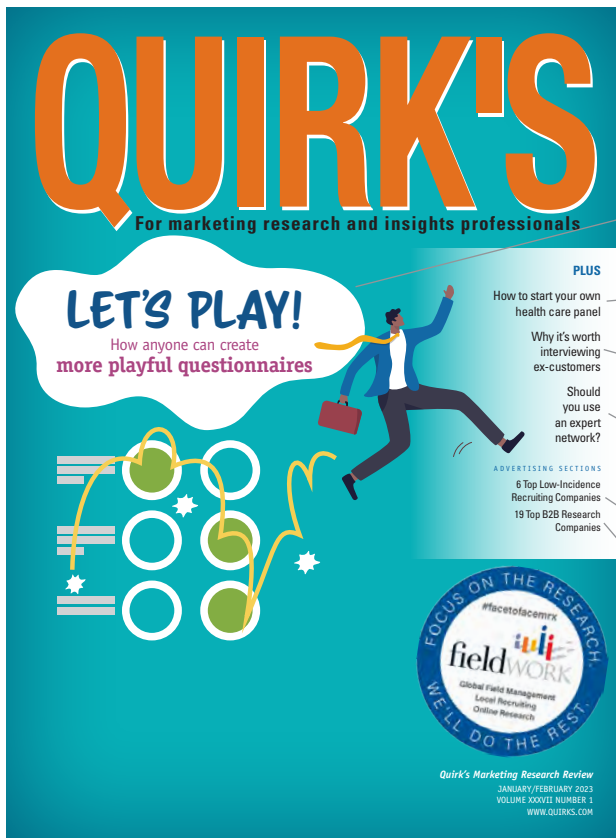
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Please note all courses can be customized to create virtual or in-person programs specific to the needs of your organization.

Happy New Year!

From all of us here at Quirk's, we hope you had a wonderful year and wish you and yours a happy new year. A lot changed throughout the industry in 2022 and we have been with you through it all! This year, we hosted three in-person events and a virtual one; held numerous webinars; and celebrated the 2022 Marketing Research and Insight Excellence award winners.



Can Quirk's help you achieve your New Year's resolution?

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Q // E-newsworthy

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Practical tips for increasing the influence of your marketing research insights

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// Noted Posts

Quirk's Blog

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Does the marketing research industry have a quiet quitting problem?

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5 big ideas from marketing research and insight professionals in 2022

<http://bit.ly/3Bbpz9F>

Research Industry Voices

Reaching the right brain to connect with customers

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Why midsize companies are great for marketing employee development

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How to lead customer experience efforts

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

Research Careers Blog

Making connections and finding a community in a new country

<http://bit.ly/3VRBq4N>

How generations are perceived at work

<https://bit.ly/3Qfd2I4>

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In Case You Missed It

news and notes on marketing and research



... consumer psychology

What's the recipe for witchcraft belief?

Analysis of a new dataset in combination with country-level data shows that witchcraft beliefs differ between countries according to various cultural, institutional, psychological and socioeconomic factors. For instance, witchcraft beliefs are linked to weak institutions, low levels of social trust and low innovation, as well as conformist culture and higher levels of in-group bias – the tendency for people to favor others who are similar to them.

As compiled by Boris Gershman of American University in Washington, D.C., and presented in the open-access journal PLOS ONE in November 2022, this analysis suggests that, while beliefs cut across socio-demographic groups, people with higher levels of education and economic security are less likely to believe in witchcraft.

The new dataset captures beliefs among more than 140,000 people from 95 countries and territories, drawing from face-to-face and telephone surveys conducted by the Pew Research Center and professional survey organizations between 2008 and 2017 which included questions about religious beliefs and belief in witchcraft.



Understanding people's witchcraft beliefs can be important for policymaking and other community engagement efforts. According to the dataset, over 40% of survey participants said they believe that "certain people can cast curses or spells that cause bad things to happen to someone." Witchcraft beliefs appear to exist around the world but vary substantially between countries and within world regions. For instance, 9% of participants in Sweden reported belief in witchcraft, compared to 90% in Tunisia.

... financial services research

Inflation impacting both sides of money transfers

Whether sender or receiver, users of money transfer services say their respective economic situations will fuel more use of the systems, according to a Western Union study. Seventy-seven percent of senders said cost-of-living increases in the country they send to have driven up the amounts they transfer. At the same time, 72% said that rising costs in the country they live in are straining their ability to transfer back home.

More than 2,000 consumers across the Philippines who send and receive money internationally were surveyed (World Bank data shows that the Philippines is the fourth-largest receiver market in the world, bringing in \$37 billion in 2021). Forty-four percent of senders state that family support is the primary driver of how much and how frequently they transfer money. In line with this, 83% of the country's receivers agree they need to receive more money to support loved ones and family.

Trust ranks as a top barrier for using digital money transfer services among senders (31%) and receivers (23%). Approximately 30% of senders and 14% of receivers do not transfer money online for reasons such as lack of connectivity, limited knowledge of digital services, no online banking history or because they are generally unbanked.

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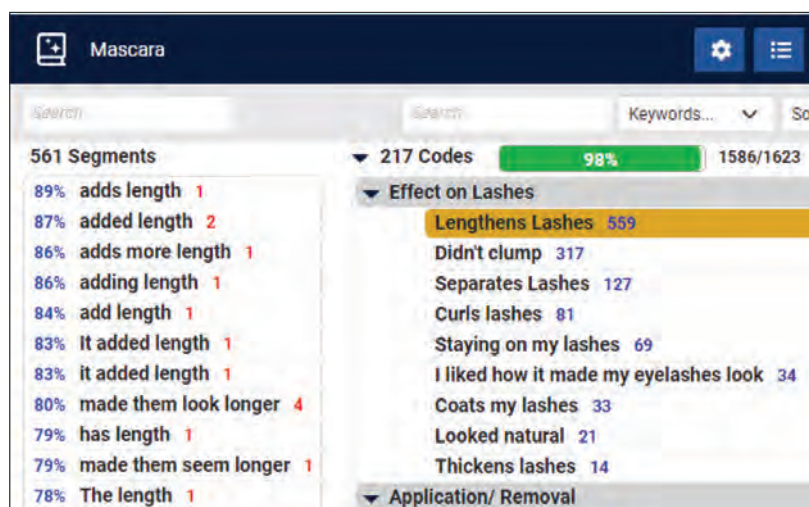


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Readers' not-really-resolutions for the coming year

Each year in our survey for our Q Report study on client-side researchers we ask one or two forward-looking questions to get a sense of what corporate researchers have on their minds and on their plates. I reported on some of the themes in my recap article in the September/October 2022 issue ("Of qual and quality," https://www.quirks.com/storage/QReport_2022.pdf) but space didn't allow for a deeper dive into the topics cited by readers so I thought I'd revisit their responses at the start of a new year to give you a feel for where you and your organization are compared to others.

Some of the responses were aspirational, like workplace versions of new-year vows to eat healthier, exercise more, get organized or stop keeping the local craft brewery industry afloat all by yourself (or maybe that's just me?). But most were frank, clear-eyed takes on their current situations and what they foresaw as some of the biggest changes for their insights functions coming down the pike.

A move toward reorganization/rethinking, whether fueled by circumstance or a drive for efficiency:

Realignment of marketing research teams to fit better with evolving needs of our internal stakeholders and organizational structure.

We just continue to be more thoughtful with our research dollars. Doing more with less, doing more DIY to save money, etc.

Ensuring that customer data from surveys can be seamlessly blended with operational and observational data for deeper analysis.

Increased use of technology, most often AI and other digital tools, typically with an eye toward greater impact:

Trying to automate more processes, e.g., collating data from all the different surveys so that the KPIs can be sent to execs.

Increased reliance on digital analytics, decreased reliance on long-form market research studies.

Continue transition from traditional methods of on-site focus groups and IDIs to more real-time, online, digitally driven options (online bulletin boards, etc.).

A renewed or heightened focus on the customer:

Per senior management, greater efforts to obtain voice of the customer, leading to actions to an increase in customer satisfaction, retention and loyalty.

Focusing on the customer journey and ensuring our metrics match our goals.

More investment in CX tied to economic impact.

Whether due to cost, poor panel data quality or a desire for greater control over their pool of respondents, many readers said their firms were turning to in-house panels:

We are developing panels and will be purchasing panel management software to help. Also conducting more qualitative this year.

Conducting a much higher share of research in-house with DIY tools by contacting our customers directly.



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Joe Rydholm can be reached at joe@quirks.com

Finding a way to get a better sample of our target audience. It is becoming more difficult to get B2B decision-makers to stop and complete research surveys.


A handful of comments were more like declarations than predictions:

The challenge is not making enough change. Company research is very outdated.

Taking a stronger point of view in recommending actions when presenting research results to business partners.

Hope to have the dog wag the tail vs. the tail wag the dog. In other words, lead with research vs. backing into it.

Being more open to conducting market research differently, in more creative ways. We've been trying out different methods and vendors to garner more engagement from our internal stakeholders.

Continuing to drive [the role of insights] in senior leadership decision-making. Already good but this will be a continued goal. 

••• advice for researchers

ASK THE EXPERT

Expert answers to important research questions.

Are vague research objectives causing excessive questionnaire iterations?

Have you ever worked on a survey project that had seven or more questionnaire design iterations before getting final approval? How about 10 or more?

Experienced researchers have all been there. Those difficult projects where we iterate and iterate and yet the change requests continue. I once had a client at draft number three insist that a block of questions was not needed and at draft number seven ask for the same questions back!

Onerous questionnaire design processes are often due to either vague objectives or weak client management practices. For time limitation purposes, I'll focus on objectives.

Vague project objectives are open to interpretation and this causes problems. The client receives the questionnaire, compares it to their understanding of the objective and requests changes that the researcher finds surprising. The back-and-forth ensues.

To determine if an objective is too vague, we impartially assess it as worded. If needed, we facilitate the process of revising to gain alignment.

The approach I use (and teach) to assess research objectives has four "ideal" criteria; a sufficiently precise objective will meet at least two, and preferably three. A great research objective tells us:

1. **How the research results will be useful.** What is the business

decision or strategy that will be informed?

2. **Who the population of interest is, in a way that is operationally usable.** It's easy to refer to a population conceptually but we need precision.
3. **What problem needs to be solved.** This might be the customer's "source of pain" or "unmet need."
4. **What hypothesis are to be tested.** If the research is about testing one or more specific hypotheses, that usually makes things easier!

For criteria 1-3, let's consider a hypothetical example:

Before: Our research objective is to generate new product ideas related to skin care for dogs.

After: To inform product roadmap planning for future dog care products, the research will generate new product ideas with dog owners whose pets currently experience skin irritation issues.

The "after" states how the research will be used (to inform product roadmap planning), something about the target population (dog owners, not veterinarians nor groomers) and the problem to be solved (skin irritation). Drafting a questionnaire for the "after" objective will be far less likely to result in excessive iterations since all parties will have a clear shared vision of the scope.

For criteria No. 4, our (hypothetical) hypotheses might be something like this:



Kathryn Korostoff
President and Lead Instructor
Research Rockstar Training & Staffing
www.researchrockstar.com
kkorostoff@researchrockstar.com



- Our objective is to test the hypothesis that owners of purebred dogs are more likely than other dog owners to prefer a medicated shampoo over a medicated wipe.

With these four criteria, I hope more researchers will spend less time on onerous questionnaire iterations and more time on the fun stuff: finding results that will ignite client insight and action!

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

QUIRK'S

OUTLOOK

2023

COMMENTARIES BY INDUSTRY LEADERS ON THE YEAR AHEAD

Welcome to Quirk's Outlook 2023! We asked research companies to offer their viewpoints on a range of topics – from panel research optimization to the effectiveness of advertising – to delve into some factors that will make an impact in the year ahead.

Talk Shoppe explores how consumers perceive advertising and its implicit associations. InnovateMR looks into panel research data quality and the process of finding a reliable panel partner. Decision Analyst focuses on creating effective advertising, its power and barriers. Zinklar explains the evolution of consumer insight platforms.

We hope this section will offer you a glimpse into 2023 and a sample of tips and tricks to help make this year a success.

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DIY RESEARCH | ZINKLAR



The power of design and implicit associations

How to get consumers to say what they actually feel about your advertising



BY CHAR-LYNN GRIFFITHS
VP Design and Marketing, Talk Shoppe

It is an established fact that people don't like ads. Or at least that's what they'll say when you ask them directly. Ninety-six percent of people in the U.S. say they don't believe ads are truthful, according to Inc. Magazine. A recent SurveyMonkey study notes that 74% say they are tired of social media ads. According to a 2019 Kantar study, only 12% of connected consumers in the U.S. say they find advertising enjoyable. With such outward animosity towards advertising, how do you get consumers to express any positive opinions about ads? And while people may say they feel a



BY HEATHER MCKINNEY
Senior Research Director, Talk Shoppe

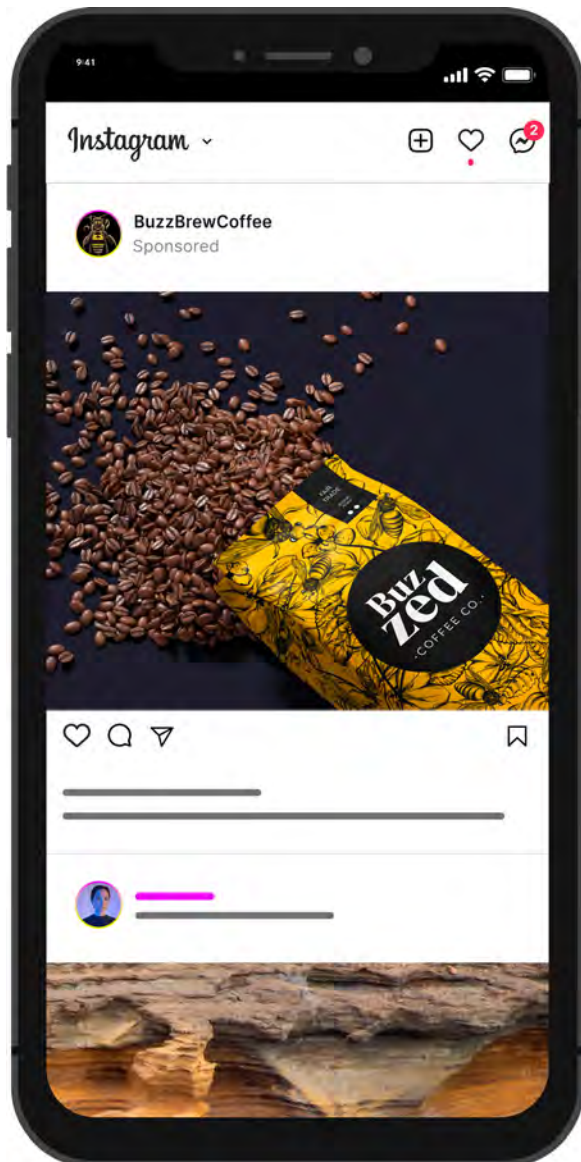
certain way, how can you find out what they actually think? The Talk Shoppe team was tasked with this challenge by a client – a social platform and advertising publisher – who wanted to know whether ad placements across different media platforms could have a different impact on how people perceived the advertisement and brand. We knew that asking consumers directly wouldn't work, so we conducted an experiment. The results were fascinating!

Hypothesis

Platform and advertising perceptions do not necessarily align. Consumers may have positive feelings towards a platform but this does not mean that they will have positive perceptions of the advertising placed on that platform. Platforms may elicit similar positive brand perceptions (i.e., they may be used, trusted or enjoyed to a similar degree) but the actual perceptions of advertising on those platforms can be significantly different. Most importantly, consumers may not even be conscious that they feel differently about the ads they see across platforms.

Challenges

We knew that separating ad and brand perception from platform perception would be challenging. First, people have a stronger attachment towards the platforms they use than they do towards the ads they see and this stronger attachment could color their reactions to any ad they saw on a platform. Second, people rarely, if ever, consciously place different ad experiences on a balance to compare-and-contrast them; they don't think, "Do I feel better about this brand/ad because I saw it on this website compared to this other website?" So, we knew that getting people to reflect on their ad experiences in a survey would be nearly impossible without leading them and biasing the research.



Another problem we had to overcome was preexisting brand perceptions. How can we separate the perceptions of the platform itself from the perceptions people may have of well-known brands and their advertising on the platforms we were testing?

Methodology

What if we could control for preexisting brand perceptions by creating a mock brand? We would then be able to place mock ads for this brand on different platforms and see how consumer perceptions changed based solely on the platform.

We decided to create a new coffee brand called "Buzzed" and place

mock ads on realistic UIs of different platforms. To accurately measure sentiments, we ran a version of the implicit association test (IAT) with our mock ads.

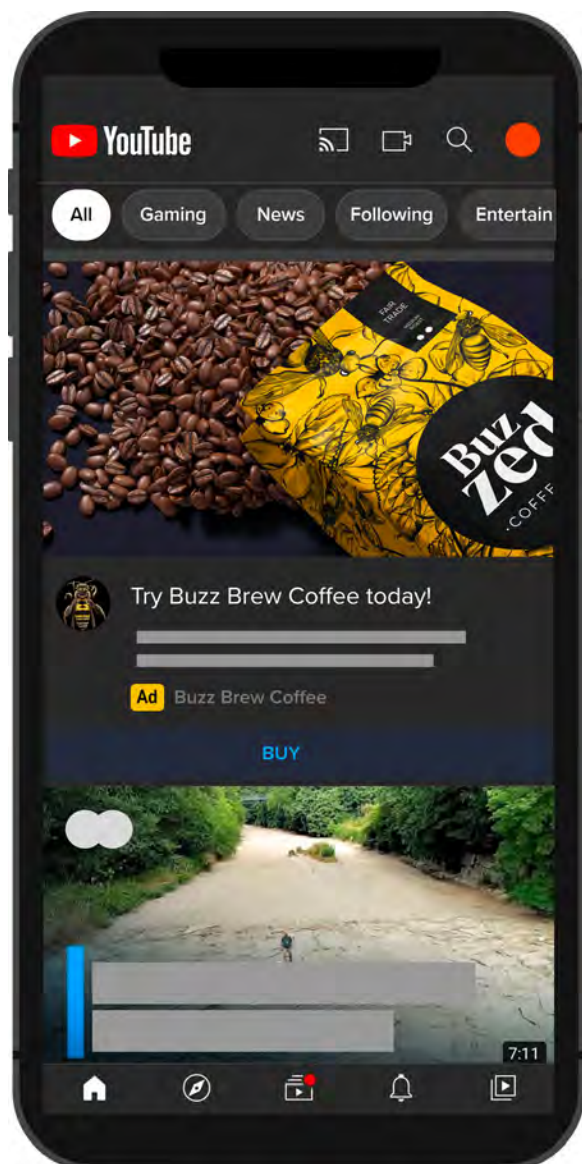
An implicit association test is a research tool that was first developed at Harvard University that measures the strength of associations between concepts (e.g., identity groups, brands, types of advertising, etc.) and a set of evaluative attributes (e.g., good, bad, honest, trustworthy, etc.). Research participants are shown two different concepts side-by-side and are asked to select the one that best matches an evaluative attribute as fast as possible. By imposing a time constraint and en-

couraging speed, research participants are dissuaded from overthinking their response; they act on instinct and first impressions.

The ultimate "aha moment" of the IAT is this: it surfaces emotions and associations people may not even realize they have about the concepts being shown. Its power as a research tool is in measuring unconscious attitudes that people cannot articulate. This is how we get at what people actually think as opposed to what they say they think.

In our study¹, we used the IAT to measure people's associations of the mock "Buzzed" advertising on different platforms (the concepts) with ad perceptions (the evaluative criteria). We

¹ Quantitative study; 15-minute online survey fielded in the U.S. from July 25 to August 3, 2022, among n=2,000 18–64-year-old Gen Pop online video viewers



showed participants the mock advertising as it would appear in-situ on two different platforms, rotating between our client's platform and competitive platforms. We put the mock advertising on the two platforms side-by-side on the survey screen, and in the center of the two images we flashed a series of one-word perceptions, one at a time (e.g., quality, trustworthy, risky, misleading, honest, happy, etc.). Once the word flashed on the screen, participants were asked to select the advertising that they most associated with that word as fast as possible.

Participants were only exposed to ads on platforms they reported visiting frequently earlier in the survey. We also asked about their attitudes toward the platforms to compare how their implicit ad opinions align with their

stated perceptions of the platforms.

Results

Our hypothesis was proven true. When asked directly (before the IAT), consumers had similar perceptions of the platforms; but their associations with the advertising on each platform through the IAT revealed significantly different perceptions. Here is one example for illustrative purposes:

Platform trust perception asked prior to IAT

+3 percentage point gap between Brand A (our client) and the competitive average

- Brand A (our client): 50% (n=1,946)
- Competitive average: 47% (n=7,791)

Association with "trustworthy" in the IAT exercise

+16 percentage point gap between Brand A (our client) and the competitive average

- Brand A (our client): 58% (n=1,946)
- Competitive average: 42% (n=7,791)

Conclusion

These results allowed our client to make more confident claims to potential brand partners about the impact of the advertising on its platform. They were able to show that while consumers may have similar stated perceptions

of advertising across platforms, their implicit and actual perceptions of the advertising differ significantly. Ultimately, they were able to prove that the advertising on their platform is more trustworthy, credible and enjoyable.

Key takeaways summary

Consumers are not necessarily conscious of how they really feel about specific ads; some of their feelings towards ads are hidden or implicit. Because consumers are not conscious of their real feelings towards ads, the range of ad perceptions across platforms are longer and more nuanced than they care to admit or even recognize.

Consumers' hidden perceptions may not align with stated (or conscious) perceptions. Therefore, positive feelings towards a platform will not necessarily translate to positive perceptions of the advertising placed on that platform.

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949-339-1072



Upholding quality data with a transparent research partner

Optimizing panel research to get quality and reliable data



BY SARAH ADKINS

Vice President of Quality and Research,
InnovateMR

Online surveys are popular amongst businesses because they allow professionals to gain insight into the thoughts, opinions and circumstances of their customer base or target audience to effectively bring innovative products or services to the table.

But not all data is created equal. Quality data is imperative in our ever-evolving world – the force that drives business decisions and change within organizations. With data quality at the forefront, I want to talk to you about

the top ways that researchers can get quality data out of panel research.

The process starts with your questionnaire; it is critically important to optimize your survey design to get the best data from your participants.

So, what types of questions should you ask yourself when designing?

Outline your target audience

The right targeting is one of the most important things when it comes to fielding a survey because the right people will provide you with the most accurate insights. For example, if I'm conducting a health care decision maker survey, I probably shouldn't be targeting consumers that don't work in that field or someone who is unemployed. By targeting the correct audience, I am ensuring that I will get the data I need to make informed decisions about the future of my business.

It is important to take the time to understand your target audience, so you know the most efficient screening criteria to use – you don't want to waste a participant's time with a survey they don't have a chance of qualifying for. A poor experience can burn a valuable participant in our finite pool of survey takers. It is essential to nurture the lifeblood of our industry.

Utilize red-herring questions

Within the survey itself, sprinkle in red-herring questions – they are a great

way to reduce fraud and increase your data quality. Unless you are surveying a very niche audience, a key practice is to keep your red-herring question(s) simple.

It is important to note that red herrings should be treated as an attention check and not a comprehension check. They can be exceptionally useful in bringing a participant's attention back to a survey when they may have started to drift off or lose interest. However, as effective as red-herring questions are, you want to ensure they aren't making the interview burdensome, which will inadvertently decrease quality.

Add open-ended questions

Another element in effective survey design are open-ended questions. Open-ended questions let you obtain even more details from your target audience. They empower them by helping them influence the organizations they engage with most and making sure their unique voices are heard. Open-ended questions are also a sure-fire way to deter potential fraudsters from infiltrating your survey because they complicate the survey process for bots. In our recent interviews with survey fraudsters featured at the 2022 ESOMAR Congress, they confirmed that the bots they were running had to be stopped so that open-ended questions could be filled in manually, a process that could

be too much effort for high-scale operations.

When asking open-ended questions, be sure to keep in mind:

1. **What** you are asking
2. **How** you are asking it and
3. **Where** in the survey you are asking it.

Keep length-of-interview short

Another way researchers can get quality data out of one panel research is to be wary of the length of interview (LOI).

Have you ever dozed off reading dry material or found your mind wandering during a meeting? The same thing can happen when a participant is bored by your survey. Studies show that people today have the attention span of a goldfish, which means you only have eight seconds to get and keep their attention on your survey. In our world, keeping participants engaged is truly a challenge and survey participants get bored very quickly by endless grids or long attribute lists. This can cause even a great participant to skim questions and they may no longer put a great deal of thought into their responses. And who can blame them? This is important because it will show up in your data and flag quality concerns.

When trying to cut down on LOI, make sure the questions and long lists in your survey are all necessary. Utilize open-ended questions but do so sparingly, as having too many can cause a respondent to get frustrated and drop out.

Ensure your survey is mobile-friendly

Believe it or not, making your survey mobile-friendly can enhance your data quality. In a world where our phones are used for nearly everything, you need to ensure your survey is compat-

ible with mobile devices to enhance the user experience and accessibility. If you limit your survey to desktop only, you could potentially be missing out on audience members who may qualify but may not have access to a computer, especially when targeting unacculturated audiences. The more accessible your survey is, the more participants can take it and the better your feasibility. What do you do when a site takes too long to load or doesn't translate well from a computer to your phone? You exit out of it, and the last thing we want respondents to do is drop out of a survey.

Having extensive grids, heavy text or too many open-end questions can affect your quality. Now, not every survey is meant to be taken on a phone, but for those surveys that can be done mobile, design is key! If a participant must do a lot of scrolling on your survey, it could lead to disengagement. It is a frustrating experience to constantly scroll through a survey that is far too long, especially on a mobile device.

Leverage new technologies

Technology is a savior when it comes to providing quality data in panel research. Advances in technology allow us to protect and safeguard insights that are gathered online as well as the ability to obtain quality results quickly to meet data acquisition and analysis timelines. By 2025, cyberfraud damages are projected to hit \$10.5 million – that's the equivalent of the world's third largest economy (Cybersecurity Ventures)! Fraudsters are only getting more sophisticated as research expands, so simple tests for speeders or straightlining are not enough. Consider technologies like router/IP checks, digital fingerprinting and text analysis as you refine your strategy. You don't want your insights to take a hit because you

aren't equipped with the most effective tools to combat fraudsters.

It is important to combine your approach in obtaining panel research in today's digital age. Overreliance on either traditional methods or online sample could cause a gap in the data that you could acquire if you were to blend both methods in your research.

Work with a transparent partner

To maintain high-quality customer relationships, businesses need to be transparent in how and why they use their audience's data and what it means for their clients. It is crucial to work with a transparent partner in your market research. This will enable you to collect the highest-quality data, which is key in an industry that demands the very best reliability. When you are having issues with data quality, a transparent partner will explain what happened and what methods to implement to prevent future data-quality issues.

No matter your role in an organization, quality research insights are vital to the day-to-day operations and future decisions of any company. Understanding your target audience, implementing efficient survey design, ensuring you're up to date with the current evolutions in technology and transparency in your methods can ensure you're optimizing your panel to gain the most quality insights from your research.

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Advertising effectiveness

Overcoming barriers to create effective advertising



BY JERRY W. THOMAS
President and CEO, Decision Analyst

The advertising industry has the poorest quality-assurance systems and, turns out, the most ineffective and inconsistent products (ads and commercials) of any industry in the world. This might seem like an overly harsh assessment but it is based on testing thousands of ads over several decades. In our experience, only about half of all commercials have any positive effects on consumers' purchasing behaviors or brand choices. Moreover, some ads have negative effects on sales. How could these assertions possibly be true?

Unlike most business activities, which are governed by numerous reliable feedback loops, the advertising industry receives little objective

feedback on its advertising. Few ads and commercials are ever tested among consumers (less than 5 percent, according to some estimates). So, no one – not agency or client – knows if the advertising is any good. Sales response to advertising once it runs is a very poor indicator of ad effectiveness. If no one knows when and why a commercial is bad, how can the next commercial be any better?

Barriers to great advertising

Advertising pre-testing (the terms pre-testing, testing and test are used interchangeably in this article) could provide a reliable feedback loop and lead to much better advertising but many obstacles stand in the way.

The first barrier to better advertising is self-delusion. Most of us believe, in our heart of hearts, that we know what good advertising is, so there's no need for any kind of independent, objective testing. Agencies and clients alike often think that they know how to judge good advertising. No need for advertising testing. Case closed. Another risk is posed by "love." Parents feel love for their new baby. Likewise, agencies and clients often fall in love with their creative "babies." Once agencies and clients start to fall in love with a proposed advertising campaign, they quickly lose interest in any objective testing of the new creative.

Another barrier to better advertising is the belief that actual sales performance will reveal whether the advertising is working as hoped. Unless the sales response to the ad-

vertising is immediate and overwhelming, it is almost impossible to use sales data to judge the effectiveness of most advertising (some direct marketing ads are the exception to this rule). For the typical mass-distributed and mass-advertised consumer product, many variables are at play (let's call this "noise") so it's impossible to isolate the effects of media advertising alone. The "noise" in sales data comes from competitive activities, seasonal changes, business-cycle effects, pricing variations, lag effects (some advertising works quickly, while other ad campaigns may take years), media effects (sales response times vary greatly, depending on the media mix), weather patterns, etc.

The big creative ego is also a barrier to good advertising. It's a combination of the "not-invented-here" syndrome and the belief that only the "creatives" in the ad agency can create advertising. The conviction that creativity is the exclusive domain of the creative department in agencies and that no one else has any right to creativity or creative input often leads to bad advertising. The big egos tend to abhor advertising testing and all the benefits thereof. In our experience, great advertising tends to evolve, with lots of hard work, fine-tuning and tinkering, based on objective feedback from target consumers. Big creative egos tend to resist such evolutionary improvements. We have seen great campaigns abandoned because agencies would not accept minor tweaks to the advertising. Big egos allow emotions to drive advertising

decision-making instead of reason and consumer feedback.

Poor marketing strategy, or the lack of strategy, is a big barrier to better advertising. Often, clients have not done their research homework and have not thought deeply about their brands and the long-term future of those brands. Rarely do clients craft and test communication strategies for their brands or provide this essential guidance to their advertising agencies. The client tells the agency to go forth and create great advertising without providing useful strategy guidelines. The agency is left to guess and speculate about strategy. Great advertising is rarely created in a strategy vacuum.

The last barrier to better advertising is poor copy testing by research companies. Many advertising testing systems are limited to a few markets and therefore cannot provide representative samples. Some systems are so expensive that the cost of testing exceeds the value of the results. Research companies are often guilty of relying on one or two simplistic measures of advertising effectiveness, while completely ignoring many other important variables. To judge the effectiveness of an ad, several key variables must be measured and linked.

Creating better advertising

Given these barriers and complications, how can clients, ad agencies and research firms work together to create more effective advertising? Some thoughts:

1. The client must develop a sound strategy for its brand, based on facts and evidence. The client must carefully define the role of advertising in the marketing plan and set precise communication objectives for the advertising. What exactly does the client want the advertising to accomplish? Once strategy and positioning alternatives are identified and tested, the strategy should be locked down – and rarely changed thereafter.
2. As creative executions are developed against the strategy, each execution should be pre-tested among

members of the target audience. The greater the number of executions tested, the more likely it is that great advertising will emerge. Pre-testing the creative provides a reliable feedback loop that helps agency and client alike make better creative decisions and become smarter over time about how to consistently improve the advertising.

3. Use the same testing system consistently. There is no perfect advertising testing system. Some are better than others but any system will help improve your advertising. The secret is to use the same system over and over so that everyone learns how to use and interpret the testing results.
4. If budget permits, test the advertising at an early stage in the creative process (i.e., the storyboard or animatic stage) and test at the finished commercial stage too. Early-stage testing allows rough commercials to be fine-tuned before you spend the big dollars on final production. Early-stage testing tends to be predictive of finished commercial scores but often the creative evolves as it moves toward a finished state, so testing the final advertising is always wise. Testing finished commercials gives you extra assurance that your advertising is working as planned.
5. Build your own “action standards” over time. As you test every execution, you will begin to learn what works and what doesn’t work. Think of the research company’s norms as very crude, rough indicators to help you get started with a testing program. But, as quickly as possible, develop your own action standards for your category and your brand as advertising effectiveness measures vary by product category and brand. The goal is to build your own database of scores for your ads. Then, use your own brand’s scores as the most accurate and reliable set of benchmarks to gradually improve your advertising.
6. Use a mathematical model to derive an overall score for each execu-

tion. The key variables must be put together intelligently to come up with a composite or overall measure of advertising effectiveness. Don’t fall into the trap of using one or two questions to evaluate your advertising.

7. Use the testing results as a guide or as an indicator and do not become overly trusting of the mathematical model’s results. No model or system can anticipate every marketing situation or give a 100% perfect solution every time. Informed human judgment remains important.
8. Continuous improvement of the advertising is important. Test every execution and fine-tune based on consumer feedback. This ensures that your ads are “on strategy” and working as best as possible.

The ultimate goals of advertising testing are to identify the elements and ideas essential to communication effectiveness and to make sure that those elements are consistently communicated by all advertising.

The power of advertising

We believe in the power of advertising based on thousands of studies in our archives. Advertising has the power to persuade, the power to set the agenda in the consumer’s mind, the power to convey information and the power to shape a brand’s identity. Advertising has short-term power (conveying new information, building awareness and enhancing credibility) and long-term power (conveying brand image, attaching emotional values to the brand and maintaining awareness). The true power of advertising is seldom achieved in practice but we can’t give up. The potential and the promise are too great. The companies that master the creative guidance and the testing systems to consistently develop and deploy great advertising will own the future and the fortunes that go with it.

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The evolution trend to consumer insight platforms

From DIY to customized



BY JORDI FERRER
Founder and CEO, Zinklar

The level of change in consumer behavior we have witnessed over the last few years is unprecedented. Managing a brand without an accurate and timely vision of how consumers react to sudden events has become a high-risk activity. In the current context, more companies are adopting consumer insight platforms to quickly access consumer insights and information. At scale.

The latest ESOMAR report published in October 2022 confirms the trend.

It shows that insights platforms, also called DIY or self-service platforms, are growing fast (+28.1% in 2021) and gaining market share in the industry. Uncertain times always bring change. 2023 is perhaps the perfect time to make the trend a habit.

An urge to evolve: three key elements

At Zinklar, we have observed three key elements explaining the evolution of consumer insight platforms.

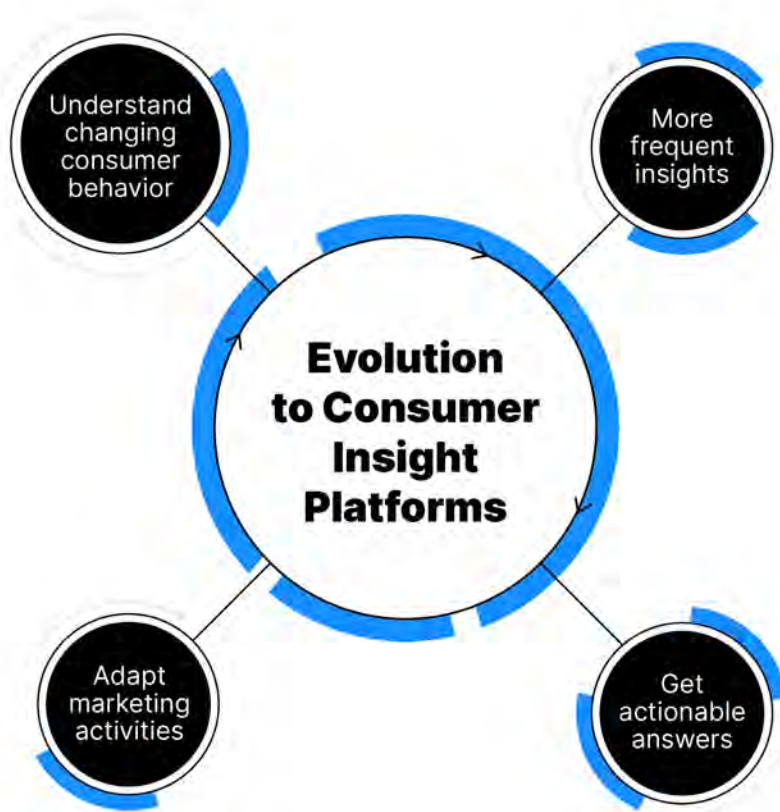
- 1. Consumer behaviors and attitudes are changing faster.** Companies need timely/fresh/frequent information and insights for their marketing activities. Being consumer-centric is the only way for brands to remain competitive and succeed in the marketplace.
- 2. Brands require more answers.** Now more than ever, organizations require fast and efficient insights. Continuously measuring the ROI of all marketing activities is a must, hence the need to refine constantly through an iterative process when developing campaigns, concepts and any other kind of marketing activity.
- 3. Insights and marketing teams need to cover more research needs.** Agile market research platforms must provide high-quality results across all areas of the re-

search cycle. All elements should be accessible in one easy-to-use platform, from usage and attitude studies to pre- and post-advertising or packaging tests, brand tracking studies and more. When this connects, it simultaneously increases the frequency and creates a virtuous cycle.

The transition from traditional approaches to platforms is already taking place in big corporations. Luciana Propicio, consumer insights manager at Panasonic Europe, recently confirmed during a panel discussion we held with Zinklar's clients that, "expectations for insights are higher in challenging times. It is even more important to make informed decisions. That's why insights teams are expected to be more agile."

But SMBs are not to be outdone. Customer insight platforms allow them to access and leverage high-quality consumer insights, something they could not do before due to the cost and complexity of traditional suppliers.

Despite the cultural barriers to changing the way things have always been done and the impression of not having enough expertise or time to manage their market research projects, companies across all markets and industries are overcoming challenges to improve their decision-making and



cover more and more of their consumers' needs.

The future belongs to those who adapt successfully to change

Evolving in the world of consumer insight platforms is not new for us at Zinklar. Every day, we guide companies to manage their projects in-house and help them see opportunities in changing times.

More than just conducting market research, it is critical to be aware of available solutions and know which one fits your research needs. Beyond DIY, we are convinced that a customized approach, based on simplicity and guidance, is key to making consumer insight platforms vital in the coming years. At Zinklar, we have created guided solutions to democratize market research and make it easier to launch

high-quality surveys to any brand. With no limits.

Companies are facing trends that will grow even faster in the future:

- The imperative need to be consumer-centric to succeed in the fast-changing and hyper-competitive market.
- More need for frequent consumer insights with limited budgets and the growing need to ensure ROI. Zinklar client Vanessa Bougla, head of insights at Avanti West Coast UK, stated that, "There's an appetite for more: more data, more quickly, more actionable answers."
- The development of technology and artificial intelligence/machine learning to integrate and cover more insights needs, deliver better quality of data and automated insights and improve the ease of use for non-experts (NPD, marketing). Platforms

like Zinklar integrate AI to ensure fraud detection, a trusted audience and reach a broader, more representative public.

It is easy to develop a platform that works. The challenge is to adapt this platform to the best practices of thousands of insight professionals and non-insight experts. Platform providers now need to offer a powerful tool but also listen and adjust it to their users' needs. Since insights should be managed efficiently, platform usability should be at the core of their features and developments. Researchers can become more efficient by automating the entire process, from sourcing the sample to data collection to reporting, ensuring data quality and the possibility to iterate on new studies faster.

Designing and analyzing a project can be challenging. Consultants are here to smooth the process and deliver more qualitative and actionable data. The team at Zinklar has years of experience in programming, launching and analyzing studies and always provides practical recommendations on the next steps, from launching a new study to preparing presentations for key stakeholders.

For insights platform providers and for market research as whole, the future is about adapting to change. We must show brands where the market research industry is moving by demonstrating how things should be done.

Worldwide events have shaped the trends and habits seen in the market research industry. We need to take the reins and guide the way to the future of consumer insights, including consumer insights platforms.

Contact us to learn more about the DIY revolution.

Zinklar.com



// Survey Monitor



••• environmental research

Is sustainability eco-friendly?

Global consumers want greener alternatives

Environmentally friendly products are on the rise and they're here to stay. According to consulting firm Simon-Kucher and Partners, consumers want to purchase products and services that align with their values and behaviors. To appeal to the wishes of their consumers, companies must adapt more sustainable processes to minimize the impact they and their products have on the environment.

Seventy-one percent of global consumers surveyed say they are already making significant lifestyle changes. They are aware of the products they purchase and the impact they have on the environment. Sustainability is increasing in importance as 66% rank it as one of the top five factors they consider when making a purchasing decision, compared to 50% from 2021. Seventy-five percent believe sustainability is as important or even more important than

it was in 2021.

Eighty-nine percent believe they have become greener with their purchasing habits by making major and minor adjustments. While most consumers want to live more sustainable lives, some are having difficulty finding products and services that don't come with a higher price point.

As inflation continues, many are finding it difficult to afford eco-friendly options and many are deciding which, if any, products or services to buy. Sixty-eight percent of consumers refuse to pay a premium for more sustainable options. (Only 32% would accept higher prices for sustainable products and services.) When asked how much of a premium they expect, answers ranged from 22% to 40%, depending on the industry and regardless of personal sustainability importance levels.

Most consumers are loyal to companies and brands that align with and share their values and beliefs. Many say the companies they trust should have similar sustainability motivators including the goal of benefiting younger generations (44%). Sixty-four percent say companies should have a sense of responsibility and 48% say they should have a fear of environmental damage.

While some companies want to be known for their sustainability processes or alternatives, some consumers question how eco-friendly those firms' manufacturing and general processes really are. Fourteen percent think that eco-friendly alternatives are not truly sustainable because of companies' potential greenwashing of their messages and packaging to make consumers believe they are more environmentally conscious than they really are. This has led 21% to distrust the claims companies have made about their sustainability efforts.

The study was conducted with 11,500 consumers worldwide to determine the willingness to purchase sustainable products and to gauge the attitudes surrounding sustainability.



••• small business research

Thriving or just surviving?

Small business owners reflect on life after the pandemic

Having survived the impacts of COVID-19, 58% of small business owners surveyed believe inflation is their top challenge, according to a study conducted by Capital One, but they are confident their businesses will stay afloat, with 90% believing that they will be operating six months from now.

Throughout the past year, a variety of other factors have weighed on small business owners. Twenty-two percent fret about competition from larger businesses, 35% are concerned about low sales and 40% are worried about cash flow. Fifty-one percent of owners have experienced higher costs for materials and supplies and 36% have encountered shipping delays. Small business owners have also seen higher delivery and shipping costs (37%) and supply disruptions and product shortages (37%), all of which have affected their businesses.

Some rising concerns for small business owners revolve around the state of the economy. Seventy-seven percent are worried of the potential contraction of the U.S. economy and 78% stress over supply chain issues, leading 76% of small business owners to fear the negative impacts their businesses could face

within the next six months.

Fifty-three percent of small business owners are still feeling the impacts of COVID-19, from its effects on regular operations to sales and staffing. Many businesses adjusted how they hire and what they offer to their employees during the pandemic. Forty-nine percent say no changes were made to their hiring practices since 2021 while 25% say they now offer more flexible hours and 13% offer remote-working options. While 18% are offering competitive wages, 44% say they find it difficult to meet the wage demands of potential employees and 39% say they struggle to find qualified candidates for their open positions.

While some business owners struggled to stay afloat throughout the pandemic, others saw it as a fitting time to begin their business endeavors (though 79% say the pandemic made it both very and somewhat challenging to start a business). New business owners say low sales (36%), inflation (42%) and cash flow (40%) were hurdles they had to overcome and 70% say they either slightly or completely changed how they operated after starting their businesses by adjusting their business models or offerings.

New business owners say they began their businesses during the pandemic because they had more time on their hands (36%), had access to funding that they didn't have before (17%) or had already planned to start a business (21%). Others say they quit to start a business (21%), were laid off and started a business (26%) or had a hobby or side job they turned into a business (24%). Forty-one percent of new owners found that networking, online trainings (36%), online articles (24%) and local or virtual business associations (22%) were helpful resources when starting during the pandemic.

Thirty-five percent of owners say local business conditions are good, 43% say they are fair and 11% say they are poor. Most owners however say it is rewarding to work for themselves and they enjoy having flexible schedules and more time to spend with their families.

Capital One and Morning Consult partnered to conduct this survey with 1,295 small business owners in the U.S. from August 25-September 9, 2022.



••• beverage research

Thirsty for more

Of all the forms of water available, consumers prefer it bottled

Whether you drink it flavored, sparkling or straight from the tap, varying attitudes over water intake are unavoidable. A study conducted by the International Bottled Water Association (IBWA) found that Americans have strong viewpoints towards bottled water. Eighty-eight percent of U.S. adults have positive opinions towards it and many consider water their most preferred non-alcoholic beverage choice.

Ninety-one percent believe that bottled water should be available where other beverages are sold. If bottled water isn't sold, 70% of people who prefer it would purchase a different packaged beverage. Twenty-two percent say they would choose soda, 10% would pick sweetened, sparkling or flavored water, 8% would get a sports drink (like Gatorade or Powerade) and 5% would choose a juice or fruit drink. If water is unavailable, 10% would drink from a watercooler, 10% would drink filtered tap water, 4% would drink from a public water fountain and 6% would drink unfiltered tap water.

Most Americans drink a mixture of bottled and tap water (72%) while 8% only drink tap or filtered water and 19% exclusively drink bottled water. Only 1% of respondents indicated that they do not drink water.

Many factors come into play when deciding on which drink to buy. Respondents like the ready-to-go feature (79%), the ability to reseal a beverage

(77%) and 81% like the convenience of a bottled beverage. The top three factors however are quality (96%), taste (96%) and safety (90%).

Eighty-three percent of Americans say water is their preferred beverage with bottled water, including sparkling, still and flavored and/or unflavored being the top non-alcoholic choice. Forty-two percent have a somewhat positive opinion and 45% percent have a very positive opinion of bottled water while only 12% have a negative outlook including 2% who have very negative opinions.

Drinking bottled water has an inevitable impact on the environment whether through the manufacturing and packaging of the water bottle itself or its disposal. Ninety percent of consumers agreed that it is important to recycle all recyclable packaging, 89% agree that making products with already recycled materials is better for the environment and 72% agree that they would purchase products that have already been recycled.

Seventy-eight agree that because plastic can be recycled and reused, it is a valuable source. Sixty-one percent believe that products made from plastic are more eco-friendly compared to materials made from glass, aluminum or cartons. Water bottles are fully recyclable, making up 49% of the plastic collected in U.S. curbside systems.

Most agree that products should be recycled when possible but who should oversee the process? Sixty-four percent say consumers should take responsibility for recycling their plastic bottles, 58% believe the companies selling them should figure out the recycling process and 47% say the government should take charge.

Bottled water is most often consumed while shopping and on-the-go (74%), at sporting or entertainment events (73%) and while at the gym or when exercising (67%). Eighty-four percent say they drink bottled water at work, 81% drink it at home and 77% drink it at social events.

This survey was conducted by The Harris Poll on behalf of the IBWA. It was conducted with 2,057 U.S. adults from September 19-21, 2022.



... **dei research**
Company DEI initiatives impact consumer habits

Black consumers notice sociopolitical stances

Companies are incorporating more diversity, equity and inclusion (DEI) efforts within their business models to fully establish their viewpoints on various issues and as they are doing so and taking stances on sociopolitical issues, many Black consumers have taken note and adjusted where they place their support.

Horowitz Research conducted its FOCUS Black: State of Consumer Engagement 2022 study and found that Black consumers are more likely to act after a company makes a sociopolitical stand. Fifty-eight percent of Black customers have altered their consumer habits after a company aligned with a specific sociopolitical issue. The actions taken were both negative and positive. If consumers did not align with the company's message, they reduced the number of purchases they made or stopped being a customer. If they approved of the stand the company made, they took positive action by spending more or becoming a consistent consumer.

Black consumers are more likely to speak out and sign petitions against

companies that take sociopolitical stances they disagree with and reward companies they align with by doing more business with them.

When offered company policy examples, equal treatment of women (66%) and policies that ensure LatinX/Hispanic, Asian and Black employee consideration for positions at companies (62%) impacted Black consumers' decisions positively.

Consumers have no trouble discerning between authentic and inauthentic initiatives. Forty-four percent of Black consumers say that more companies are depicting insincere DEI initiatives compared to a year ago. However, 45% say they're seeing more companies who want to make a real impact and do better with the initiatives they have put in place.

Forty-four percent say they are also noticing companies investing in their neighborhoods, whether by creating more jobs or helping improve area schools. As well, the entertainment industry is changing. Fifty-five percent say Black characters are being shown in a better light and 57% say more Black actors are being cast as leads in shows. They say comedies, dramas and original content positively show Black characters while lifestyle and dating reality shows, sci-fi and the news portray Black people and characters negatively.

The FOCUS Black: State of Consumer Engagement 2022 survey was conducted by Horowitz Research. It was conducted with 1,800 adults in July 2022.



••• food research Meal kits pick up the slack

Restaurant restrictions led to DIY meals

Post-pandemic restaurant capacity restrictions and shutdowns resulted in a drastic reduction of meal outings but that didn't stop people from finding and purchasing alternatives. Many decided to limit their excursions and dine more at home. However, whether due to convenience, general interest or health reasons, many consumers turned to meal kit delivery services like HelloFresh, Blue Apron and Home Chef. According to consumer services platform Drop, as reported in a survey conducted by insights platform Upside, after the pandemic hit in March 2020, meal kit orders increased by 92%.

Forty-six percent of Canadians and 36% of Americans placed their initial order because they had a coupon or discount for the service. Twenty percent of consumers believe that purchasing meal kits saves more money than ordering from a restaurant. But saving

money is not the only factor when ordering from a meal kit service: Many are interested in cooking as a hobby and use meal kits to spark inspiration.

Upside calculated consumers' scores for importance and satisfaction to establish the most important meal kit features. Reducing the amount of money spent on food hit a 101, minimizing the amount of cooking prep time totaled a 92, the ability to minimize food waste scored a 90 and the healthiness of the meals resulted in an 89. Ninety percent believe it is very or somewhat important to gain exposure to new recipes and ingredients. Eighty-six percent are satisfied with the option to try new food items.

Meal kits hit success after the pandemic but they are declining in popularity as the world attempts to return to normal. Twenty-four percent of respondents ordered weekly when they first began using the services. Thirty percent ordered a few times a month, 20% ordered monthly, 10% ordered every two to three months and 9% only ordered once. When asked about their current meal kit service use, 21% indicated that they order once a week and 24% say they order a few times a month. Sixteen percent are monthly users, 11% order every two to

three months and 12% never use meal kit services. The declining use of meal kit services may be a result of the re-opening of the world or the decrease in coupons offered after the initial order or a mixture of both.

Meal kits served as a replacement for dining out for many, which may have justified their prices for some. However 65% percent believe that meal kit services are too expensive. Thirty-eight percent would rather purchase their own ingredients, 19% prefer their own recipes and 25% believe the process is too much work. Twenty-five percent of respondents say that the services do not offer options that fit with their dietary needs. Upside found that people with dietary restrictions, including those who are following vegan or keto diets or are gluten-intolerant, etc., are in a niche category but would be consistent consumers, devoted to meal kit services that offer options that fit their lifestyles. Another untapped area meal kit services could dive into is the "heat and eat" sector of meal delivery as both Americans and Canadians indicated that they would be interested in a service that offered already-prepared meal options.

This study surveyed 500 U.S. and 500 Canadian adults.

●●● special advertising section

19 TOP B2B RESEARCH COMPANIES

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Founded 2020
Chris Wells, Managing Director

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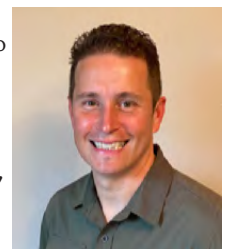
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Sean Campbell, Co-Founder and CEO

Whether your organization needs to take advantage of a market opportunity or is facing a competitive threat, you need clarity. Unfortunately, many B2B tech



companies have worked with research partners in the past who are generalists. These same firms claim that their methodology can be applied to any industry, any type of company or any



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John Mitchell, President and Managing Principal

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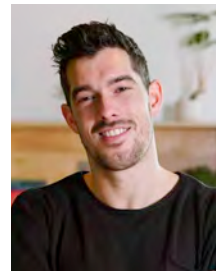
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Using conjoint to gauge physicians' views of a diabetes test

| By Lauren Fusfeld

snapshot

Lauren Fusfeld offers a case study on employing conjoint analysis instead of a clinical study to assess clinical utility.

For people with Type 2 diabetes mellitus, early identification of individuals at risk of diabetic kidney disease or a rapid decline in kidney function is an important step for optimal patient management and improved patient health outcomes, such as slowing or preventing disease progression. Nevertheless, traditional tests of kidney function are insufficient for predicting kidney disease and decline.

To address this unmet need, a medical technology company developed and validated a blood-based test that incorporates biomarkers to predict the risk of kidney disease/decline. The firm sought to demonstrate to physicians and payers the test's clinical utility, defined as the extent to which the test affects physicians' monitoring and treatment decisions.

The key question was the following: Would U.S. physicians change their medical recommendations to align with patient management guidelines if they had access to the results of this blood-based biomarker test?

Finding a remote approach

Traditionally, companies have relied on prospective clinical studies to establish clinical utility. The downside of using a clinical study for initial research, however, is that such studies require significant resources, costs and time. The pandemic made finding a remote approach to assessing clinical utility increasingly important.

The medical technology company engaged our team of researchers to identify an effective and efficient methodology for demonstrating clinical utility. Based on a detailed understanding

of the company's needs, we suggested conjoint analysis, an approach recommended by the International Society for Pharmacoeconomics and Outcomes Research for this type of investigation.^{1,2} This study design has been utilized to understand preferences of patients with Type 2 diabetes mellitus and other conditions,^{3,4,5,6} as well as to assess factors that influence physician testing decisions in other indications.^{7,8}

Conjoint analysis derives the importance of attributes included in descriptive vignette-based profiles (which could be products or patients) based on participants' responses to these profiles. In this case, physicians documented decisions regarding monitoring frequency, treatment prescribing and drug dosing after viewing hypothetical patient profiles in a self-administered online survey. This method simulates the real world, in which physicians assess multiple relevant characteristics of each patient when making medical recommendations. By deducing attribute importance implicitly from physician decision-making, conjoint analysis can avoid some of the biases that result from requiring physicians to comment on the importance of these factors directly in an interview or online study.

Based on secondary research and consultation with clinical experts, we identified six factors or attributes likely to impact physician decision-making: the patient's age; results of the novel blood-based biomarker test; and results of four conventional patient measurements – albuminuria, estimated glomerular filtration rate (eGFR), blood pressure and glycemic control

represented by hemoglobin A1c (HbA1c) level.

Patient profiles included one level from each of the six attributes. With four levels for the blood-based biomarker test result (no test result, low-risk result, moderate-risk result and high-risk result) and three levels for each of other five attributes, 972 unique profiles were possible. A significant advantage of the conjoint design is that analysis is possible using a small subgroup of the total collection of profiles. We created a subset of 42 profiles with Sawtooth Conjoint Value Analysis (CVA) software. The design was orthogonal, which means that each pair of levels (across different attributes) was intended to appear approximately the same number of times. To balance the need to minimize standard errors (<0.1) for a conjoint exercise designed for 400 respondents with the desire to reduce respondent fatigue, we determined that the survey software should randomly present each respondent with eight patient profiles from the subset of 42 profiles. The profile selection adhered to a least-fill methodology so that each of the 42 profiles would appear approximately equally.

For each patient, the survey asked physicians to make one monitoring frequency decision (increase monitoring frequency, decrease monitoring frequency or maintain standard monitoring frequency). The survey also asked the physicians to make three binary treatment decisions: 1) increase the dose of lisinopril to 20 mg per day for kidney protection or continue the dose of 10 mg per day for kidney protection; 2) prescribe a sodium/glucose cotransporter-2 (SGLT2) inhibitor that has a diabetic kidney disease indication or not prescribe an SGLT2 inhibitor that has a diabetic kidney disease indication; and 3) replace ibuprofen (which could adversely affect the kidney) with a non-systemic therapy or not replace ibuprofen.

Questions before and after the conjoint section served to provide context for the conjoint responses. Physicians described their typical care of Type 2 diabetes mellitus patients and indicat-

ed their overall likelihood of using the blood-based biomarker test. Following the conjoint exercise, respondents also answered a few specific questions about the blood-based biomarker test, including perceived advantages and disadvantages. The survey was intended to take 15 minutes to complete.

Five physicians participated in a pilot test of the survey to identify any elements requiring clarification or modification. During this test, our team watched the respondents take the survey in real time and were available to answer and ask questions as needed. To evaluate test-retest reliability, the physicians viewed a version of the survey that included two identical additional patient profiles (hold-out cases) not included in the original set of 42 profiles. Based on the interviews, we refined the text describing the attribute levels before formally launching the survey. For example, we replaced ranges for each level with point values and added interpretive clinical descriptions of eGFR levels (i.e., normal, mildly or moderately decreased) and albuminuria levels (i.e., mildly, moderately or severely increased).

After reviewing all the survey data to ensure quality control, we examined the responses in the conjoint exercise. Because data were sparse for the option to decrease monitoring frequency (selected for only 5% of patient profiles), we combined the decrease monitoring frequency and maintain standard monitoring frequency options so that monitoring became a binary variable, like the other medical decisions in this study.

Using Sawtooth Menu-based Choice Software, we analyzed physician responses using multivariable logistic regression models for the monitoring frequency decision and for each of the three treatment decisions. Each of the four models generated relative utilities for the attribute levels. The difference between the minimum and maximum utility for an attribute produced an initial estimate of the importance of the attribute in a physician treatment or monitoring decision; we then normalized these importance values so

that the sum was 100% for each model. Additionally, to evaluate the decision impact of the blood-based biomarker test result versus no test, we used utilities to create odds ratios with 95% confidence intervals.

A clinical benefit

The conjoint analysis suggests that physicians attribute a clinical benefit to predicting the risk of diabetic kidney disease in Type 2 diabetes mellitus patients before kidney damage occurs, as well as predicting rapid decline in kidney function in people with diabetic kidney disease. For the decision about the frequency of monitoring risk factors for diabetic kidney disease, the blood-based biomarker test result was more important than the other patient attributes; for the three other patient management decisions, the blood-based biomarker test result was second in importance. Specifically, the blood-based biomarker test result was second to HbA1c in importance for the decision about prescribing SGLT2s with a diabetic kidney disease indication, second to blood pressure for the decision about increasing the dose of lisinopril and second to eGFR for the decision to replace ibuprofen with a kidney-sparing medication.

Importantly, this study indicated that physicians are likely to apply the blood-based biomarker test results appropriately. A low-risk test result reduced the likelihood of frequent monitoring and of more aggressive treatment compared with no test, suggesting a low-risk test result could limit unnecessary therapy, minimize side effects and lower treatment costs. Similarly, a moderate- and high-risk result increased the likelihood of monitoring and treatment changes to protect the kidney in patients at higher risk of diabetic kidney disease or rapid decline in kidney function; consequently, the blood-based biomarker test could contribute to a more personalized approach to diabetic kidney disease management. Also noteworthy was the statistical significance of the odd-ratios of the blood-based biomarker test; all were statistically significant apart

from the impact of the low-risk and moderate-risk result on increasing the dose of lisinopril.

Lastly, the conjoint analysis allowed us to explore the impact of other patient characteristics on physician decisions. For example, patient age did not have a statistically significant impact on physician decisions regarding monitoring frequency and replacing ibuprofen with non-systemic therapy.

Some limitations

The conjoint analysis approach does have some limitations. First, the findings are limited to the attributes and levels included in this analysis. While we used secondary research and consultation with clinical experts to focus on the most important attributes, we acknowledge that other patient characteristics may also influence physicians' treatment and monitoring decisions. Second, while the study was designed to represent real-world decision-making, survey results could differ from physician behavior in a clinical setting. As time and funds allow, additional research could be conducted to confirm these initial findings now that the current study has provided proof of concept. In fact, the conjoint analysis could serve as a guide in the design of optimal endpoints in such a prospective study. Likewise, additional research could also measure the health outcomes of Type 2 diabetes mellitus patients whose physicians

had access to the novel blood-based biomarker test results, as the conjoint study was not designed to assess the impact of changes in monitoring and treatment on patient outcomes. Finally, as researchers, we seek to share our findings with a broader audience by publishing the results in high-impact journals. Determining the appropriate journal for publication can be a challenge because some journals, especially those with a clinical focus, may have difficulty identifying reviewers who have the appropriate mix of clinical and biostatistical expertise to assess conjoint analysis techniques in clinical utility studies.


Right treatments, right time

Given opportunities for improved diabetic kidney disease risk prediction, physicians could provide the right treatments at the right time, understand when the risk of damaging the kidney exceeds the benefit of certain treatments and tailor monitoring frequency to each Type 2 diabetes mellitus patient.

With conjoint analysis, we were able to accomplish the following study objectives in a cost-effective, time-efficient and robust manner:

- quantify the clinically and statistically significant impact of the novel blood-based biomarker test on patient management decisions;

- objectively demonstrate the test's value to physicians across a range of patient types by evaluating the relative importance of the blood-based biomarker test's results compared with standard-of-care test results and other clinical factors.

Conjoint analysis, one of the many tools in a researcher's toolkit, is a robust and useful methodology for demonstrating clinical utility. 

Lauren Fusfeld is director at research and consulting firm Veranex. She can be reached at lauren.fusfeld@veranexsolutions.com.

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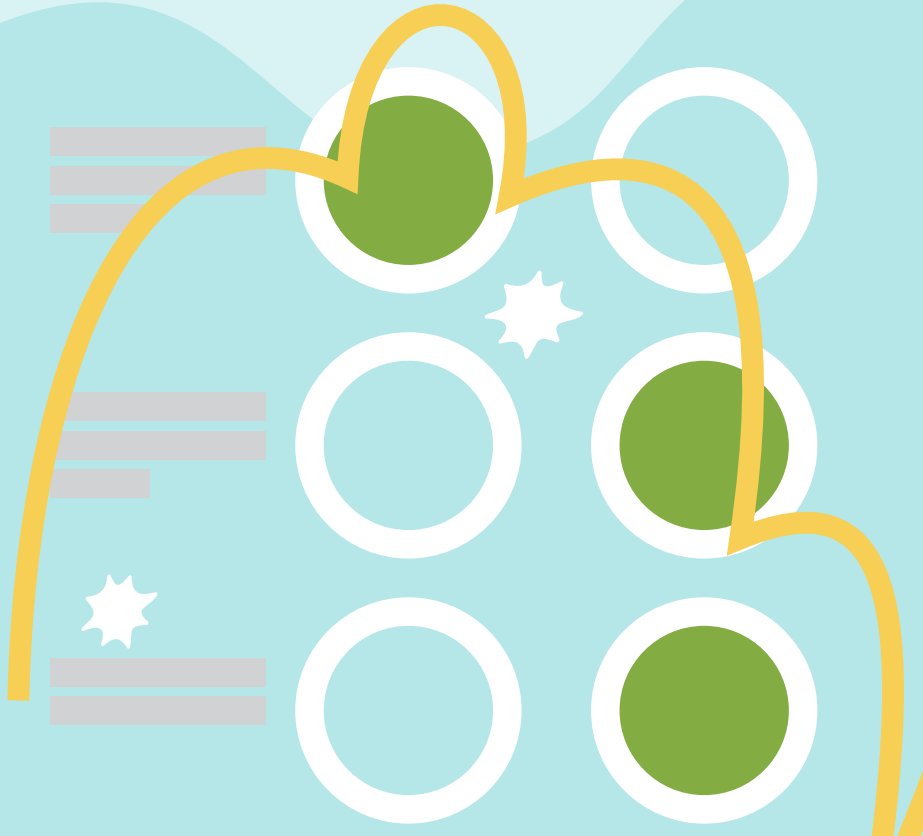


LET'S PLAY!

How anyone can create more playful questionnaires

| By Annie Pettit

Annie Pettit outlines low- or no-cost ways to make questionnaires more fun.



Research about insurance isn't fun. We know. We asked. We also know why people complete questionnaires. Our survey revealed that 36% of people participate because of the incentive whereas only 11% participate because surveys are fun. These results aren't surprising because online questionnaires haven't changed much in the 25 years we've been using them. We still rely on templated questions paired with radio buttons, checkboxes and text boxes. People have seen these formats so much that they're a huge bore in comparison to the easily and quickly accessible 1 million games in the Apple App Store and the half-million games in the Google Play Store.



Unhappy with those statistics, we decided to run our same survey but with a playful twist to the wording and design. Our new results revealed that 32% of people answer questionnaires because they're fun and only 25% answer them for the incentives. The simple process of converting a traditionally designed questionnaire into a more modern experience reminded people that surveys can be fun. That they are intrinsically motivated to participate in them.

Imagine how response rates across our industry would improve if every one of us worked to change that 11% to 32% in every one of our questionnaires. It is possible. Here are some techniques you can try right now.

● **Use friendly language.** Is your writing sterile and scientific or kind and friendly? Most questionnaires are written with formal and professional language because we know that weak

language leads to misinterpretations. However, there is a point where words are so formal and precise that they become problematic. They require more advanced reading skills and they feel antiquated and condescending. Excessive formality frustrates and bores people, leading to decreased attention or dropouts.

Beyond avoiding jargon and acronyms, we need to switch from formal to informal language. Instead of asking about coffee consumption, we should ask about drinking coffee. Instead of asking about intent to purchase, we should ask about plan to buy. Instead of asking if they received assistance, we should ask if they got help. One of the benefits of switching to informal language is that the words tend to be shorter and simpler. This in turn increases accessibility for people who are less accustomed to reading as well as those who are working in their second, third or fourth language.

● **We can also switch to more interesting scales.** Yes, many scales have been finely tuned over the years such that we can carefully track norms

from decade to decade. But unless it's imperative to track that exact norm, it is okay to switch the question up and add a bit of fun and humanity. Change "extremely negative" to "I hate it" and "extremely positive" into "I love it." Similarly, consider changing "0%" into "0%, uh oh!" and "100%" into "100%, yay!" These options are friendlier, more casual and more similar to the real-world conversations we have with our friends and family. This makes them easier to understand and more engaging.

● **Finally, ignore stifling grammar rules.** In such a time where demiurgic thought is extolled and emboldened, we must comprehend that grammatically impeccable writing is neither necessary nor desirable. Perfect grammar sounds weird and pretentious to native speakers. Our goal is not to create magnificent sentences. Rather, our goal is to create language that is comfortable and easily understood. And sometimes that means starting (and finishing) a sentence with the word "and." Similarly, instead of asking, "To whom should we send the free sample," it's friendlier to end the sentence with a preposition

and ask, "Who should we send the free sample to?"

Consciously examine how much formality has been inserted into a questionnaire simply out of habit and not because it's a better, friendlier way to connect with people.

● **Encourage!** Have you ever worked with a mentor? That encouraging person who pushed you forward especially when you were bored, annoyed or discouraged? Especially when a survey format or topic is boring (I'm looking at those overly repetitive questionnaires with the eight looping brands!), take the opportunity to be the questionnaire author who genuinely encourages and supports people participating in research.

At the beginning of questionnaires, we can do much better than, "Thank you for agreeing to participate in this research." One of my favorite additions is, "May the survey force be with you!" Other interesting messages include, "Time flies when you're having fun. Let's begin!" or "Your guess is better than mine. Let's go!"

● **We can be more encouraging throughout the questionnaire as well.** Find one or two natural breaks in the questionnaire and insert an encouraging, respectful message. Tell people they've done a good job so far and their efforts are appreciated. Remind people that their contribution is respected and valued. Consider fun phrasing like, "Keep on spilling the beans. You're doing great" or "You're in the home stretch. Keep going!"

It can be hard to get creative so take advantage of all the creative ideas all around. The internet is full of movie quotes, TV show titles, book titles, expressions and idioms, all of which are opportunities to leverage a play on words. Keep in mind, of course, that every message needs to make sense to people who don't know the original reference. Get creative, but be clear.

● **Share your power.** Feedback is a gift. And I don't mean an unwanted gift from your ex. Throughout an entire questionnaire, despite the fact that participants probably have more personal expertise about the category than the researcher, we control the questions and answers they are allowed to give. The participants very likely notice

the questions and answers we miss or misinterpret.

It's time to hand the controls over to them, at least for a minute. Always finish a questionnaire with an optional open-end text box or audio/video recorder that invites people to share any additional opinions they might have. And invite them to criticize the questionnaire itself. Let people have the last word.

*You're about halfway through the article so you're definitely in my good books!
Keep going!*

● **Create playful wording.** Go beyond kind and friendly language and start getting qualitatively creative with questions. In a typical questionnaire, we might see a question like, "From the following list of chocolate and candy bars, please select your three favorite bars." Because the question is so basic, it's a prime opportunity to get a little creative. Instead, try asking, "If you could pack any candy bars in your travel bag for free, which three would you pick?"

Another traditional question is, "From the following list of colors, which one is your preferred color for this camera?" Spiced up, that question could be, "Which one of these fruits/flowers/crayons/candies/paintings shows your favorite color?"

In both cases, while the more playful question veers away from the precise original intent, the end result will be similar. As long as the playful question gets at the essence of what we really need to know, take the opportunity to be more creative when you can.

● **Create playful question formats.** When you have a scripting expert on your team, focus on visuals as well as the words. Again, think of those checkboxes, radio buttons and text boxes we've been relying on for ages. For comparison, the games you're addicted to on your phone or tablet use swiping, flicking, animation and more. It's about time the research industry caught up and added some excitement to surveys, at least a little bit.

Beyond just showing images of packages and flyers, ask people to click on the part of an image that they love or hate. Ask them to select a painting, flower or meal that best represents how

they feel about a cell phone provider. Ask them to find an image before a timer runs out. Ask them to assign chips to concepts. Take advantage of drag-and-drop, swiping and zooming instead of falling back on boring answer lists and open text boxes. We have the technology to do it.

FOOL YOURSELF INTO BEING CREATIVE

No matter how uncreative you think you are, there are lots of techniques you can use to fool yourself into being creative.

One of the most mechanical techniques is word association. Start by building a list of unrelated prompts, e.g., time, food, restaurants, sports, plants. Then, take one prompt and break it into further categories. For example, time becomes day, night, afternoon, summer, winter, hour, minute, clock. Then, put yourself in a situation related to each of those words. Morning could become "What is the first thing you like to eat in the morning?" or "What do you like to hear on the radio as soon as you wake up?" or "If you were watching the sun rise, which of these beverages would be in your hand?" Repeat for all of the remaining words until you identify a creative idea. Your initial ideas might be boring or even awful but the goal is to design a few playful options, not a replacement for every single question.

● **Your cell phone, tablet and game closet hold a plethora of exciting ideas.** What games are available from the Apple or Google store right now? What games have you downloaded to your phone and used for several months? What board games do your nephews always pull out of the closet? Identify the activities taking place within those games and replicate the essence of them. Ask people to match shapes to products or colors to people. Have them assign pictures of money to different concepts.

Perhaps best of all are TV game shows. A quick internet search for "game shows" results in thousands of inspirational images. Take particular notice of game shows like "The Price is Right" which specialize in shopping and consumerism. They've already come up with hundreds of gamified ways to ask how much a product is: Pick

INSPIRATION IS EVERYWHERE.

It might be difficult to tease out exciting questions when you're just starting out but over time it gets much easier.

THE BEST TIME TO START IS NOW.

the most/least expensive product from this list. Which two products would you buy instead of this one? Which of those products would you swap for this product?

Let their ideas spark your imagination.

Inspiration is everywhere. It might be difficult to tease out exciting questions when you're just starting out but over time it gets much easier. The best time to start is now.

A FEW GUIDELINES

To generate the best possible playful questionnaire, there are a few guidelines to keep in mind.

● **First, never disregard the basic tenets of questionnaire design just so you can incorporate playfulness.**

No matter how much you love your newly designed question, no matter how fun and playful it is, if it doesn't clearly relate to the research objective then delete it. If it's not logical and clear to old and young, don't use it. Playful questions need to generate quality data, not randomly fun data. Quality data must always be the first goal.

● **Second, think about the audience.** If that really engaging, playful question only speaks to a niche audience, it won't be effective. A playful question that bears no relation to the

category is disruptive and confusing so don't include a basketball game in a survey about hotels. If it's research about travel, rock the boat a bit and use playful words and games that align with travel. If it's research with an audience of gamers, change the game and definitely add an extra dose of playfulness.

● **Third, allow extra time to pre-test.** Questions that incorporate drag-and-drop, sliding or other technical nuances need to be pre-tested in as many platforms as possible – iPhone, Android, PC, Apple, Windows, Ubuntu. Further, read the comments in early completes to see if any of the playful wording has been misunderstood. Playful questions that don't function properly or are not understood ruin the research experience and create poor-quality data.

● **Finally, don't overdo the playfulness.** It's easy to convert every question into its playful counterpart, leading to a virtual circus show of a questionnaire. Just as incorporating no playfulness is boring, the opposite is exhausting. Aim to incorporate a few pieces of playfulness here and there throughout your questionnaire. Use playfulness with purpose.

IT REQUIRES COURAGE

Adding playfulness to questionnaires requires courage. It's scary to ask stakeholders to cast aside decades of outdated norms in favor of creating a research experience that more people will actually want to participate in. We've put a lot of faith into norms that made sense five years ago but sometimes those norms aren't "correct" now – not that we ever knew what "correct" actually was. Valid norms are a product of allowing people to express their thoughts and opinions in ways that feel friendly and comfortable.

By using these techniques, I hope you'll see a shift in your participant experience metrics. Beyond helping people feel more comfortable sharing their real and well-thought-out opinions in research, you'll create better data for yourself and share in creating a better future for our industry.

Thanks a bunch for reading this article. I hope you found a tidbit or two that you can start using today! 📌

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●●● customer experience
research

Wait! Come back!

The benefits of soliciting feedback
from lost or defecting customers

| By Doug Pruden and Terry Vavra



snapshot

Doug Pruden and Terry Vavra explain
why ex-customers are an overlooked
source of valuable information.

In a profession that is driven by information about current and potential customers, a source of remarkable insight is frequently overlooked. We're referring to defecting and lost customers. Let's face it: As managers we don't like to relive or review our mistakes and that's what lost customers are, right? We've done something or failed to do something else which results in a customer walking away. Rather than reliving the frustration by investigating the departure, we're happier bumbling forward and unknowingly making the same mistake(s) over and over again!

Also preventing fully tapping into this source of insight are the actions of defecting customers. They can be divided according to how vocal they are. Many will simply leave in silence – the passive defectors, whose information is not volunteered to the marketer. Others, recognizing their investment in time with a supplier, will reach out to express the issue or problem precipitating their departure – the active defectors. Both have valuable information for the marketer. But the insights from passive defectors will never be heard without an outreach to them. And, because actives are the vocal minority, effort must be taken to see that their feedback is properly weighted versus any information collected from passives.

While marketers are routinely comfortable spending resources on studying current customers, interviewing lost or departing customers may be considered a waste of time. But collecting feedback from defecting customers is a sound business practice. The philosophy behind such actions is analogous to the "zero defect" philosophy of manufacturing. A manufacturer doesn't look to its acceptable products as a way to improve a manufacturing process; it studies its defects.

If you think about it, customer satisfaction studies can be thought of as being conducted among a biased population. Whether they're totally satisfied or not, current customers are nevertheless biased toward a brand or service by virtue of their persistence to remain as customers. Lost



and gives you the opportunity to fix it. Welcome volunteered comments from all customers, ongoing and defecting. When companies don't listen and respond to customer problems it's likely they'll not only lose the customer and the customer's future stream of purchases but also suffer the impact of the unhappy customer's negative word of mouth!

Still feel a bond

Customers generally develop an emotional attachment or an association of convenience with a vendor/supplier. Even though they may stop conducting regular business with a supplier, chances are they still feel a bond with the company, so an outreach from the company isn't considered that unusual; it may actually be appreciated. There's also the feeling of flattery – being contacted and asked for their help and opinion. Plus, any contact gives them the opportunity to vent directly to the company rather than letting off steam by complaining to friends and family about it. Finally, their defection may have been under duress but made necessary by the absence of response to a prior question or outreach or the lack of appropriate information.

Ideally any outreach to defecting customers should include: an identification process; a communication tool; a data collection survey; a diagnostic stage; and an action-planning sequence.

Customer identification. The first question to be answered is, do you know who your end-use customers are and can you easily identify when a customer has stopped doing business with you? For B2B organizations, the answer is more likely to be yes, as opposed to a B2C organization dependent on a multi-tiered distribution channel with intermediaries. A robust customer database is mandatory. (In the online marketplace of today, this information is becoming increasingly routine, if not for the entire enterprise at least for substantial lines of business.) What some customer databases lack is full integration with the transactional operations of a business. Information such as typical purchase size, frequency of purchasing, history of returns, requests for service, rebates or refunds should all be incorporated to make the database as useful as possible.

Communication tool. The approach to the defected customer needs to be well-planned and sincere in tonality and appearance. Communication starts the process but should also be involved in closure. Far too many outreaches to customers are started without ever being completed with an expression of appreciation or an acknowledgement of how the insights gained will be used to eliminate the problem or issue experienced by the defector.

customers, on the other hand, are the marketer's "defects." These customers, who've abandoned the brand, may offer a perspective of the brand or service which is more comparatively realistic in the marketplace.

Willing to help

So they've left us. The door is closed, right? After all, if they've defected, why would they help us out? Surprisingly, defecting customers are more accessible (and willing to help) than you might imagine. You need to set aside your likely bias characterizing lost customers as unwilling to offer any useful information if asked. Consider these experiences from several studies among lost customers:

- A surprising proportion of lost customers will cooperate with a marketer's outreach (up to 20%).
- Their responses are generally constructive and thoughtful, rarely disrespectful.
- Amazingly, a portion will often indicate they'd repurchase the marketer's brand and they'll describe exactly what the marketer needs to do to bring them back.

We have always encouraged our clients to seek customer feedback and (as painful as it can sometimes be) to listen very carefully to comments from unhappy customers. But information supplied by lost or defecting customers creates some psychological problems. We need to be careful how we mentally classify the information to be gained. The immediate reaction will be to consider the information as complaints. And this will create a defensive bias, prompting an unwillingness to accept the information.

To prevent this bias, think of a critical comment as a gift because it identifies a point of pain from the customer's perspective which alerts you



Data collection/survey. Some form of data collection will be necessary to assemble the insights from the disenchanting customers who are defecting. A tool commonly used for this is the exit interview. There is, however, no widely accepted format or list of questions to be included. Exit interviews we've seen have varied from a short list of simple yes-no questions to the equally short-appearing but glaringly formidable open-end question asking, "Tell us why you left." The ultimate answer is to ask only necessary questions and to allow respondents to voice their opinion in at least one open-ended question.

Diagnostic stage. We suspect few exit interviews have been preceded with a plan for the analysis of the information to be collected. Data analysis should never be relegated to a contemporaneous hunch. Rather, a disciplined approach should be created prior to collecting any information. This plan should specify comparisons to be made, identification of the major dependent variables and specifying segments of responders thought to be of value.

Action planning. Lastly, plans should be in place to specify: 1) how frequently/when exit-interviewing should be conducted; 2) the departments assigned as process owners with respon-

sibility to correct identified problems; and 3) a time schedule within which remedies should be implemented. We recommend all three issues be addressed, up front, prior to implementing any customer offboarding process.

Influence the success

The following factors strongly influence the success of collecting good information from defecting customers:

The medium of the survey. The goal in choosing a medium is to maximize response rate while minimizing intrusion into a departing customer's life. Telephone interviews command attention but often interfere with a customer's work or personal time. Near-universal caller ID further undermines responses. Mail surveys are less intrusive but also tend to generate far lower response rates. Today's prime medium is online communications, starting with an e-mail or text invitation and then progressing to an online interview or chat.

The presentation of the questionnaire. Conceivably this is the marketer's last communication with the customer and how it is presented may influence the customer's long-term memory of the marketer. The questionnaire package has two objectives: to

acknowledge/confirm that the customer has stopped purchasing the marketer's goods or services and to request information about the circumstances which led the customer to defect. The request and questionnaire ought to be as personalized as possible, reinforcing the impression that the customer is known as an individual. Also, any accompanying correspondence ought to be personally signed and appear to be individually prepared, further demonstrating the marketer's concern.

The explanation accompanying the questionnaire. How can customers who have stopped doing business with the marketer be expected to answer their questionnaire? The answer is the marketer's sincere request for help! The message delivered to the lost customer must be, "It appears (or we know) you've stopped buying from us," and "We're asking for your help so that we can fix the situation to prevent other current customers from experiencing the same problem(s)." Many customers will be happy, even flattered, to provide their perspective of what is wrong with the marketer's product/service, delivery system, customer support, etc.

The structure of the questionnaire. Customers will provide information but the marketer must also be realistic. The goal, within five or so questions, ought to be to identify the problem(s) that lost the customer. Resist the temptation to ask how likely the customer might be to come back, as this appears too self-serving.

How completed questionnaires will be collected. Provide an impartial, third-party auditor or a senior executive of the company to receive the returned questionnaires. Clearly state this in your accompanying correspondence. This will help demonstrate the sincerity of your outreach by your planned objectivity.

Close the loop. Respondents deserve to hear your appreciation of their feedback and especially how you plan to use it. Acknowledge the issue they've identified and let them know you've either already addressed it or are in the process of remedying it. If it can't be changed, briefly explain the constraints you face.

Invitation to return. Once you've fixed the problem and a reasonable amount of time has passed, it's quite

fair to reach out to defected customers with a message that you've addressed the concern/problem that caused them to defect and are now inviting them back! The offer of a "returning customer" promotion can be quite effective.

Additional benefits

Interacting with defected customers can provide a wealth of information. Beyond identifying the root causes of customer defection, the process can also provide a wide range of additional insights and benefits. The process can:

Broaden the understanding of systemic problems. Because so few customers ever complain, information collected through exit interviews can help complete the picture of problems and inadequacies. It just pays to attempt to interview all defected customers.

Prepare customer service representatives to be more effective in their interactions with departing customers and suggest remedies that can be offered for common problems.

Help create a profile of the high-likelihood defector. Understanding what departing customers did (their purchases, their outreach – number of

Like any company process, instituting a defected customer program takes a commitment from the entire organization and from senior management.


contacts and expressed concerns, etc.) before they took their business elsewhere can help a company proactively identify future at-risk customers.

Identify win-backs by uncovering the identities of lost customers who indicate they're willing to consider repurchasing if an issue or problem has already been fixed. Win-back percentages are far greater than mass sales prospecting campaigns (after all, the "grass is rarely greener").

Create goodwill by showing enough concern to reach out to customers. Though the process, by itself, is unlikely to cause a customer to reverse his/her decision to leave, it may make the customer more receptive to future win-back efforts or reduce the likelihood of them generating negative word of mouth about the company or brand!

Takes a commitment

Like any company process, instituting a defected customer program takes a commitment from the entire organization and from senior management. Not all management teams will be willing to call attention to the issues of customer

retention and lost customers. And, once a process is adopted, the adoption curve needs to be flexible; changes will need to be made to maximize the benefits from the program. But not having an exit-interview process in place ignores a potential source of rich strategic information. Smaller organizations (who are more likely in day-to-day contact with their customers) will find the program a more natural outgrowth of their conduct of daily business. Larger organizations will have to deal with more details and overcome siloing of information. But regardless of size, all organizations will find the insights gained from defected customers to be of substantial strategic value! 

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••• health care research

A prescription for success

How to build a health care data collection panel

| By Jerry Arbittier



snapshot

Jerry Arbittier offers a 12-step plan for turning a health care database into a health care panel.

In the summer of 2000, I met with Howard Ziment, CEO of the Ziment Group, a marketing research company that specialized in health care. He was interested in building a panel of physicians to complete marketing research surveys on the internet. Ziment was an early believer in the value of developing a physician panel. In fact, by the time we met, he had been working on the concept for five years and had recruited around 8,000 physicians. At our meeting, he told me that a major competitor had indicated that they had a physician panel. Competition breeds innovation, as the saying goes, and in this case competition increased the urgency for building the panel. He sought me out because of my background in building panels for media marketing research company Arbitron. While media research and health care research are quite different, he felt my experience would allow me to build a successful physician panel. I accepted the position, not realizing that his vision would lead to what is now estimated to be a \$300-\$400 million data collection industry.

Currently, between 5-10% of physicians in the United States participate in marketing research studies each year. A physician marketing research study usually includes only 150-250 respondents because of the limited population and the limited participation rate. This is minuscule in comparison to the size of most consumer studies. Greater insights could be obtained if larger physician sample sizes could be reached by the existing data collection companies. In fact, all the current data collection companies increase the number of respondents that they can deliver by purchasing sample from their competitors as their respondent delivery drops over the fielding of a study. However, even with this pooling of resources (termed “topping off”), they cannot obtain exceptionally large numbers of respondents for a study.

There are many types of companies (e.g., marketing research firms, publications, promotion firms) that maintain physician contact informa-



tion but do not use it to augment the current pool for health care data collection. This is a waste because adding these physicians to the top-off pool would achieve two goals: supply larger sample sizes so that health care marketing researchers can do more in-depth studies; and supply another revenue stream for the participating companies.

The purpose of this article is to provide a toolkit for converting a company's health care contact database into a health care panel.

Step 1: Contact database vs. marketing research panel

There are different definitions for what is a contact database and what is a marketing research panel. For our purposes, the difference between the two is based on the quality of the contact information and the likelihood that the contact will respond to a request to complete a survey. Some contact databases are not useful for doing marketing research. For example, the information in the database may have been obtained from a hospital directory where the doctor's name is provided but their e-mail and telephone numbers are not directed to the doctor themselves but to a centralized service. There would be little point in using this type of database to recruit for a marketing research study.

Some companies have health care contact databases that are very accurate and relevant. The database information may be used to deliver promotions, magazine subscriptions, in-house marketing research, etc. However, these databases are not the same as the panel database used by data collection companies for health care marketing research firms because for a panel database, the database has been optimized to get higher response and the respondents have agreed to receive surveys.

The panel database has been optimized to produce higher response rates by:

- gaining agreement with the respondent to do marketing research;
- exclusively using the respondent's contact information for health care marketing research studies;
- providing substantial honoraria for completing a study and paying the physicians promptly;
- providing studies that are relevant to the physicians; and
- adhering to a set of strict terms and conditions and privacy rules.

Step 2: Contact database review

The second step to developing a panel is to determine the validity of your company's database. It is important to do an honest assessment. The difference in cost of developing a health care panel from a good contact database vs. a bad one can be millions of dollars. The assessment of your database can be based on a priori assumptions. However, it is probably worth taking some more objective measures. Sending the database to a service to process it for bouncebacks, duplicates, etc., will provide statistics as to its quality. If, after reviewing your database, you conclude that you can obtain at least 500 physicians in a specialty to opt-in to take surveys, then it is likely worth moving forward to convert the database into a panel for that specialty. (Note: The number needed can be smaller for very targeted specialties such as gynecology, oncology or bariatric surgeons as long as there will be enough demand to maintain response rates.)

Step 3: Developing a champion

I have found that one of the hardest things in building a health care panel is developing a champion within the company to run it. Everyone has day-to-day job requirements and developing a panel is typically something outside of the normal work stream. While the champion will need to have good, logical reasoning, it is equally important to have someone who is enthusiastic about the task. You can hire someone from outside the organization to do this but it is likely to be harder for a new person to learn the company culture and structure than it will be to develop the panel using internal resources. Finding the correct incentives for an internal employee is the best way to move forward. In addition, hiring internally has the added benefit of showing that you are providing growth opportunities within the organization.

Step 4: Registration survey

If you have the right database and the correct person to lead development, then the next step is to create a survey to register the physician into the panel. Typically, one advantage of a panel is collecting a set of information one time and then you do not have to collect it each time you do a new survey. This does not work well in health care. Most health care marketing research firms want information to be current and therefore even if you have the data in your panel database, they will ask the respondent to provide the information again in their survey. Because of this, the registration survey should be short and only needs to include information regarding the health care professional's specialty; their contact information; an opt-in agreement based on specific terms and conditions; an explanation of privacy rules and a consent to transfer personal information; verification of credentials; and a thank-you page. The registration survey should not take more than five minutes to complete. A short registration survey also has the advantage of obtaining a high participation rate.

Step 5: Mailing out the registration survey

It is important to remember that when you send the registration survey to your contact database, you have not yet obtained consent from the respondent to receive invitations to a survey. If you hire an outside company to do a mass mailing, while they might not require that contacts in your database have agreed to get the e-mail, they will typically require that you adhere to the following:

- provide the ability for the respondent to opt out of future mailings;
- remove any words from the invite e-mail that the mailing company believes will typically cause it to be viewed as spam;
- do not include images in the e-mail;
- follow CAN-SPAM Act guidelines.

It is also recommended that the bulk mailings only include around 1,000 e-mails at a time. The aim of all of the above is to avoid getting blacklisted by internet providers. If you do the mass mailing using your own company, it is still recommended that you follow the above guidelines so that your company's mail server does not get black-

listed. In addition, it's best to have an active survey with a fair honorarium available to the respondent at the end of the registration process.

Step 6: The e-mail invitation

An e-mail invitation that obtains the best response typically will not have many words. It should highlight three key points: length of the survey (in minutes); survey topic – this should be under five words; and the amount of the honorarium for completing the survey. If you go into elaborate detail about the topic or benefits to the medical community for completing the questionnaire, you will lower the response.

Step 7: Storing the panel

When first starting out, you will likely be able to store the panel on simple Excel spreadsheets. But as the company grows, having a professional panel system will be necessary. You will need this so that you can maintain statistics on your panel activity, track reminders and find non-active respondents, etc. Luckily there are relatively low-cost software packages to do this as long as the panel is not too large.



Step 8: Building a panel website

When you are registering a panel, it is most likely that the respondent will want to get background information on your company. The best way to do this is to develop a panel website and direct the respondent to learn about the company from it. It is important to not develop the website within the website of your current business. Combining the two will be confusing for both the respondents and your current clients.

The website should address the following: information about the company; a way to register for the panel and a method to opt-out of the panel; terms and conditions for joining the panel; and privacy rules. It should also let the panelist update their profile, manage their honoraria and contact the help desk.

Step 9: Maintaining response

After getting respondents into the panel, the next step is to keep them registered in it and responding to surveys. All health care panels pay substantial honoraria for completing surveys. The exact amount is dependent on the length of survey, the quota size, the specialty and the topic.

Research has found that the primary reasons for physicians completing surveys are: obtaining the honorarium; learning about new medications and procedures; and making an impact on the industry by having their opinions heard.

And out of the above three reasons, the amount of the honorarium is by far the most important. You can more than triple your response rate by doubling your honoraria.

In addition, over the years I have sat in many long meetings about how to increase panel engagement. However, I have only seen two processes that really work: quick honoraria payment and an excellent help desk.

Step 10: Have a flexible honoraria system

Over time, you will find that the response from specific specialties may go up or down. Therefore, you must have a system in place that allows you to systematically change honoraria to address response rate fluctuations.

Building a health care data collection panel

Step 1: Contact database vs. marketing research panel

Step 2: Contact database review

Step 3: Developing a champion

Step 4: Registration survey

Step 5: Mailing out the registration survey

Step 6: The e-mail invitation

Step 7: Storing the panel

Step 8: Building a panel website

Step 9: Maintaining response

Step 10: Have a flexible honoraria system

Step 11: An excellent help desk

Step 12: Monetize your panel

Step 11: An excellent help desk

If a physician gets stuck in a survey or has not been paid their honoraria, they need a way to get help. They will get easily frustrated if they do not receive help quickly. A help desk that responds in real time is best. However, the minimum requirement is that all help-desk requests be cleared before the end of the workday.


Step 12: Monetize your panel

A health care company usually develops a panel to address a specific internal company need that is not related to providing a panel for health care marketing research. If the database is accomplishing the specific need, it is easy to lose sight of the value of the panel to data collection companies. Internally, some will express objections to opening this revenue source. You should work hard to overcome these objections. Let the naysayers know that because of the strong need of additional sample by data collection companies, they will likely collaborate with your company to address your objections and make it easy to obtain the additional revenue. Panel companies have set up systems that will allow your company to provide them sample without the need to provide the actual contact information of your panelists and the panel companies will make it easy to link your database to theirs.

In addition, it does not take a sales effort to monetize your panel. Data collection companies will be eager to use your panel and will significantly reimburse you for the opportunity. Therefore, the barriers to entry are not large and the costs of development are small.

Strong need

The above 12 steps supply an outline for starting your own health care panel. If you have the proper contact database, it is not that difficult to turn it into a health care panel that can be used for internal purposes and to service the health care marketing research community. There is a strong need for more health care panels.

Over the last 20 years, I have developed two major health care panels but I have not done this on my own. I would like to dedicate this article to the late Stephen Gerzovich, who passed away in December, and also thank the following for all their help: Sal Brucculeri, Tony Burke, Hilary Fischer, Jason Freeman, Miriam Haynes, Matt Walmsley, Howard Ziment and the hundreds of colleagues who helped All Global (originally WebSurveyResearch) and Survey-HealthCare become such a success. 

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••• b2b research

Going right to the source

The risks and rewards of using expert networks for B2B research

| By Raeann Bilow and Sean Campbell



snapshot

Expert panels are growing in number and popularity. Are they an answer to B2B respondent quality issues?

The expert network industry is booming. Currently, expert networks generate more than \$1.9 billion in revenue in aggregate. There are also more than 100 expert networks in operation, with new entrants popping up regularly, and the space is projected to grow substantially, following a year-on-year growth rate of greater than 20% in 2021.

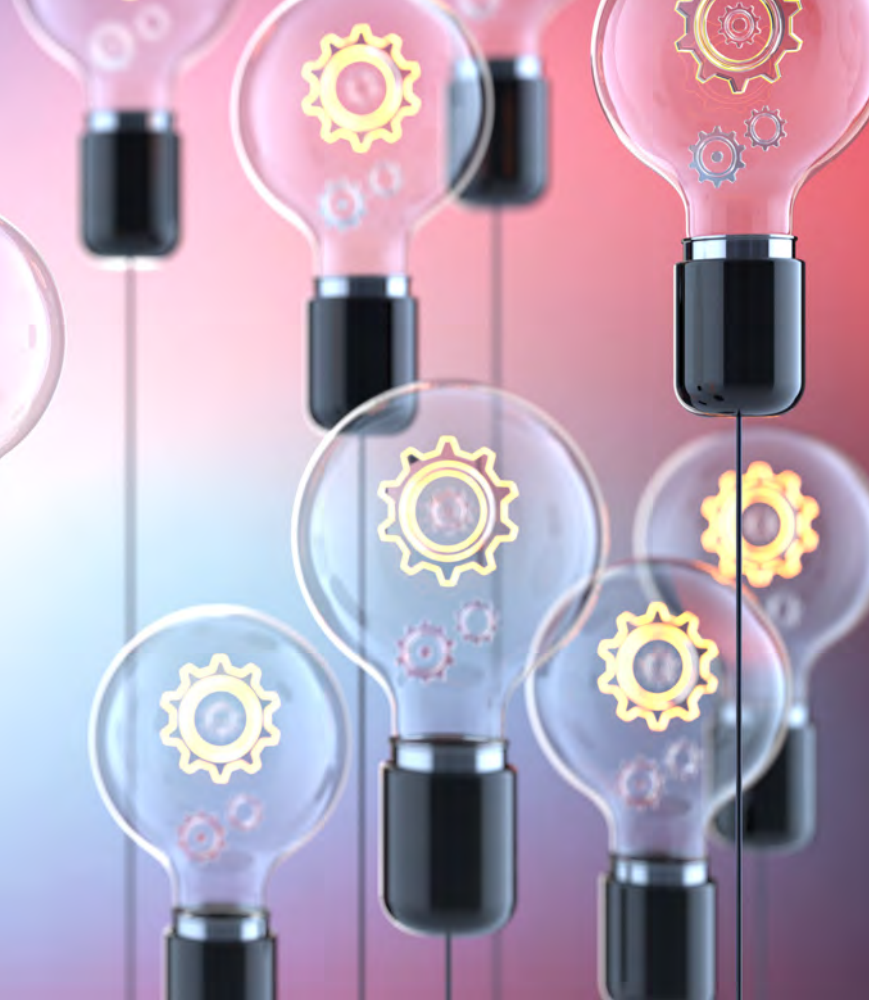
B2B companies that utilize expert networks to recruit participants for research studies see substantial benefits, particularly in the quality of market research respondents. Specifically, these organizations can quickly interact with niche participants who have the exact job title, work history and area of expertise that is needed for a particular B2B study.

However, expert networks are a fast-moving new industry that comes with both risks and rewards. To help weigh the pros and cons, we've outlined some of the potential benefits B2B companies could gain – or what risks they might face – by working with expert networks.

Share their expertise

What is an expert network? Expert networks connect clients with paid experts who share their industry or job role-related expertise. They facilitate the matching of expert respondents to a researcher's interest area. They also schedule interviews, create processes to ensure that any information exchange is compliant and handle respondent incentives.

While expert networks have been with us for some time, at least since the launch of Gerson Lehrman Group's offerings in 1999, the rapid rise of LinkedIn and other online resources that expert networks can access has fueled the recent boom. Platforms such as LinkedIn have nearly 850 million users and tend to expand rapidly due to network effects. Thus, expert networks can quickly mine billions of pieces of data focused on career histories, job responsibilities and job titles across a wide range of industries and geographic locations.



Expert networks are equally as beneficial for the participants. Participating in an expert network has become a legitimate side job for C-level executives, investors, consultants, business decision-makers and other professionals.

Panel firms have historically been the primary source of participants for market research organizations. Panel providers manage a private database of potential respondents that they can match up with different market research studies. Based on the information that the likely respondents have provided about themselves, panel providers can then source participants for a wide range of studies.

Unfortunately, in recent years, panel firms have struggled to provide large numbers of quality respondents for B2B research studies. One reason for this struggle is simply how data is retrieved about participants and how up-to-date this information is. Storing data about potential research participants in a panel provider's proprietary database vs. retrieving information about these participants from a "live" database such as LinkedIn is very different.

For example, consider Brian, who, at 38 years old, was a senior software engineer at Microsoft focusing on data center initiatives. At 39, however, he became a CTO at a tech startup focused on biotech. While 38-year-old Brian may have been a great fit for one B2B quant study, 39-year-old Brian would be a fit for a completely different B2B study.

Importantly, at the moment Brian makes this shift, he is unlikely to update any of the data panel providers have stored about him. Plus, the surveys panel firms send out to "update your data" have notoriously low response rates. Yet, Brian is extremely likely to update his LinkedIn profile shortly after making his career move, something an expert network is able to pick up on quite quickly, given the focus expert networks have on using "live" databases vs. more static proprietary ones.

All the while, Brian's personal preferences as a consumer haven't changed much from one year to the next. He may care about Formula 1 racing just as much as he did before he made his career switch or he may like pasta just as much. This is why panel providers may still be valuable today for companies with a B2C focus or for studies that can target a broad audience group. However, when a study calls for a more focused and narrow participant group like B2B research often requires, panel providers may come up short.

Let's look at some of the risks and rewards of using expert networks.

Reward #1: Quality of respondents

Perhaps the biggest reward of using expert networks is the quality of respondents they yield. Expert networks validate via LinkedIn or another public source that the respondents are who they say they are. This includes validating up-to-date information on a potential market research participant's job title, past job history and their broad area of expertise.

While expert networks take more of a hands-on approach, panel providers leverage an internal database or those offered by third parties to get the quickest response at the lowest cost. Not only does this require a market research firm to expend additional resources in verifying their participant pool, but it can lead to a study that an organization may struggle to trust.

Risk #1: Cost

Expert networks tend to cost about double what panel firms do on a per-respondent basis. This extra cost should be factored in when scoping a research effort so an early decision can be made as to whether a study should be downsized or whether the project's budget should be increased.

The higher cost of working with expert networks can be especially impactful for quantitative studies, which require more respondents than qualitative studies. For example, running a B2B tracking study of $n=1,000$ participants for each quarter over the course of a few years would require a company to spend tens of thousands of extra dollars to get the same number of respondents as they previously received from a panel firm. Or, an organization would need to adjust the tracker's sample size to keep project costs the same. A change of this magnitude would then have to be explained to key stakeholders and teams inside the company, some of whom may tie programs, initiatives or even team or individual bonuses to the tracking data provided by the study.

Reward #2: Niche respondents

B2B companies typically target a more tightly scoped audience than B2C counterparts. For example, recruiting a data scientist who works in health care with three years of machine learning experience is going to be more difficult than identifying a 50-year-old who likes baseball for a consumer study.

However, modern-day expert networks are well-equipped to recruit these types of niche B2B respondents. Since they have access to more up-to-date information, including a potential participant's work history, experience with certain verticals and technologies, etc., they can zero in on niche respondents.

Risk #2: Contract issues

Beyond providing insights to the organization as a whole, market research teams also act as a source of best-practice information on research initiatives. This includes a focus on compliance. Overall, centralized research teams ensure that all research partnerships with sample suppliers are established on solid principles and on legal conditions that make sense for the organization.

Unfortunately, these teams need to watch out for a bit of a poison pill that exists in a number of the contracts that expert networks ask their clients to sign. The most concerning proviso is a consistent one that frequently states that an expert network's clients cannot contact a participant for future research initiatives unless they go through that same expert network – again and again – to source a given individual.

This type of legal agreement can create a number of unintended consequences for any organization, particularly for large enterprise organizations and their market research teams. For example, a large organization may have a variety of rogue product managers or marketers who directly engage with a wide range of expert network providers. A scenario such as this makes it impossible to know if research participants have been sourced – time and again – from the same expert network or multiple. To mitigate this risk, market research teams should work to remove these types of clauses from the contracts they sign with expert

network providers. Or at a minimum recognize how these clauses might interact across the contracts that the organization signs.

Reward #3: Up-to-date respondents

Whether it's part of the Great Resignation, the Big Quit, the Great Reshuffle or some other factor, more and more people are changing jobs or occupations or dropping out of the workforce entirely. Those in new positions may have new responsibilities and may not even be in the same sector as before. If they were previously a key decision-maker, are they still making the buying decisions now? Or if they were working for an enterprise company yesterday, are they leading a startup today?

This amount of job churn has made it nearly impossible for panel providers who focus on B2B audiences to keep their databases up to date. Remember Brian? In this scenario, an expert network already knows of the job change Brian has made, maybe only hours or days after he starts in his new role. By contrast, organizations that use panel providers typically only know this information after a respondent has failed a screener. This puts the onus on the end client to ultimately validate whether a panel provider has provided a solid respondent.

Risk #3: Sticking with just one expert network

It can be risky to utilize only one expert network to try to meet all of your research needs across different studies. Since expert networks will often each have their own niches that they specialize in, it's important to keep a wide range of different providers at hand.

For example, here is just a bit of a random sample of some popular expert networks and their specialization:

IvyExec – connects senior-level professionals with paid research engagements for research companies, consulting firms and businesses. It also offers executive job opportunities, career advice and more for business leaders.

Inex One – provides infrastructure that stores all confidential expert calls or content shared by SMEs, while also managing multiple experts and monitoring a company's expen-

diture for expert calls. Its clients include consulting firms, private equity firms, hedge funds and asset managers, and corporations.

CleverX – utilizes programming to help look for the right SME based on input business or project keywords. Its network of experts includes business consultants from companies like Tesla, Google, Forbes, Ford, Apple, Shell, Coca-Cola, Walmart and more.

Gerson Lehrman Group (GLG) – connects business clients with insights from its network of approximately 1 million experts to provide financial information and advice for investors and consultants. GLG's clients include strategy consulting corporations, hedge funds, private equity firms, professional service firms and non-profits.

NewtonX – utilizes an AI-based search tool that transforms inputs into database queries with more than 40 fields. It collects and maintains a marketplace of experts for industries like advertising, marketing, health care, HR, manufacturing, real estate and more.

Third Bridge – provides investment insights and professional consultation or services, with a library of high-quality content for business, investments and consulting purposes.

Guidepoint – connects clients to professional advisors who can guide a one-time project of business expansion or provide expert suggestions via one-on-one interviews.

AlphaSights – offers industry experts for business data analytics, insights, surveys and personal experiences. Suitable for investment bankers, private investment firms, mutual funds, management consulting, corporations and non-government organizations.

Coleman Research – mainly used by business management consultancies and investment firms. Services include one-on-one consultations, quick polls and expert surveys.

Capvision – services large and prominent financial institutions, consulting firms and global corporations. Can provide insight into offshore manufacturing units, business expansion, investment decisions or fund management.

Reward #4: Quicker insights

It's a relatively standard process for expert networks to require their potential participants to confirm their identity through their company e-mail. This ensures that only the right respondents are recruited for the study the first time around.

Panel firms, on the other hand, will often unknowingly recruit respondents who are no longer a good fit for the study. Many times this is caught in the screening process; sometimes, it may even sneak past any quality checks in place. In this case, companies have to stop and disqualify a large percentage of the respondents before going back and attempting to fill the survey again, adding to the overall timeline of the project.

Risk #4: Insider trading and exposing trade secrets

Interviewees of expert network participants must be very careful not to elicit information that legally should not be disclosed. For example, participants may accidentally share confidential and detailed pricing information, a product roadmap or other information that could flag an insider trading or trade-secret violation. The interviewer at the receiving end of that information may not be thinking of, or even fully understand, the ramifications of that information having been disclosed. This potentially puts the organization they work for at legal risk.

This issue tends to be particularly prevalent if the person conducting the research is not a market researcher by trade. Rather, they may be a member of another team, like product development or marketing.

For example, consider a product manager who wants to speak to someone who used to work with a competing organization. This product manager wants to understand how well their features are positioned compared to competing products. The participant then starts to share details about the product and its capabilities, including features that are not yet released or even publicly announced. Neither side may realize just how sensitive that information exchange may be at the time or fully grasp the implications of it being revealed.

Given risks such as these, market research teams should put appropriate compliance checks in place, so direct interactions between company employees and expert network participants are appropriately monitored.

Reward #5: Trust, but verify

A famous Russian proverb states, "Doveryai, no proveryai," which translates to "Trust, but verify." This truism can be easily applied to any B2B market research study, as all market researchers should double-check, if not triple-check, the quality of every market research respondent.

In essence, when it comes to B2B research, the results of a study are only as good as its participants. That's why it's crucial to have full transparency on who exactly is involved in your research project from the start. Only when this is the case is it safe to share conclusions and recommendations with a broader set of stakeholders and decision-makers inside the company.

Expert networks can provide this transparency by offering the ability to contact respondents to confirm their identity or even follow up on a question. For example, there may be instances where a group of respondents answers a question in a way the company was not expecting. If the survey had been distributed via a panel provider, the company would have been stuck with the confusion of these responses, unsure if they could truly trust what the results say. Expert networks, however, provide the ability to reach back out to those respondents to get a clear and complete explanation as to why they chose that response.

Risk #5: Decreased quant study size

Since sourcing participants through an expert network costs more than through a panel provider, companies utilizing expert networks will have to make a choice: increase the budget for the study or reduce the size of the study. Of course, the third alternative is even less palatable: choose to keep costs low and risk that some or perhaps all of the sample leveraged for the study is invalid.


This pain is particularly acute for quantitative studies, simply due to the larger number of respondents required to complete these studies. As a result,

companies will need to decide which is more important: the quantity of respondents or the quality of respondents.

Enlighten any study

The Bahema people who live in the Democratic Republic of Congo have a saying, "Wisdom is like fire; people take it from others." Expert networks provide this type of fire – a fire that can enlighten any study with well-chosen participants.

Yet, as previously discussed, this enlightenment does come with risks. Many of these risks are based on the fact that the expert network landscape is growing rapidly and this wildfire needs to be vigilantly monitored.

Fortunately, this is a challenge that market research teams are well adapted to address. By leveraging what might be years or even decades of experience in dealing with sample providers, these teams can help organizations maximize the light that expert networks provide. Yet, at the same time, these teams can minimize the risk of getting burned by an expert network provider who might be trying to "move fast and break things." 

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••• b2b research

Not as I do

Don't repeat these costly B2B marketing mistakes

| By Alan Hale



snapshot

Alan Hale shows how research can help your company avoid making some common organizational blunders.

I've spent many years in consulting and marketing research and have conducted over 275 B2B projects. I've seen many successes – and also numerous failures. This has allowed me to identify common marketing mistakes that I've seen repeated across a wide variety of companies and industries.

Most of these mistakes could have been addressed and resolved with robust marketing research. Research is most valuable when the insights it gathers drive actionable strategies and tactics. This use of research turns it from a line-item cost into an investment. Sadly, Bain Consulting has estimated only 22% of B2B companies identify and act on insight.

Use the following as a checklist to see what mistakes, if any, your organization is making.

Be unwilling to have your paradigm challenged. Are we sure there is not a better way to do something? Does senior management still believe the market acts as it did 15 to 20 years ago? Are accounts really leaving due to price, as your salespeople say? Do we really know what our customers want and value? How loyal are they to us? Are our customers raving fans and brand advocates or are they brand assassins?

We once had a construction equipment manufacturer client that said they knew their customers very well. They estimated the Net Promoter Score for their top customers at 35%. The research indicated a -47%. Issues of delivery, service and responsiveness badly hurt them. They were absolutely shocked they were so far off in their assessment. It was a complete disconnect.

Incorrectly identify your target market(s). We find there are too many companies who do not identify their target market or who do only demographic characteristics, which is not sufficient. When I hear, "The product (or solution) is right for everyone," I cringe. There are few products like sliced bread. As part of your segmentation, identify and profile your ideal



stuff that does not matter to the customer and costs time and money should be stopped.

Not crafting the right value proposition/product fit. Why should someone buy from you? Some people call it the unique selling proposition. Others call it WIIFM – What’s in it for me? Is your solution solving a pain point? When you are trying to poach a company from a competitor or get a customer to switch to a new technology, you have to go beyond being me-too and give them a reason. Does it do something faster, cheaper or better than the alternative? Is it different? Does it allow your customer to sleep better at night?

We use the following mathematical equation: $V = B \pm CX/(C+R)$. Value equals benefits of the product and brand, plus or minus customer experience, divided by the sum of cost added to perceived risk.

Risk is an interesting variable. Suppose a plastic bottle manufacturer develops a new bottle that costs 10% less than the current one. This savings doesn’t mean much to the potential new customer if there’s a possibility the bottling line might have to be shut down and the plant manager loses her bonus. You need to look at the overall value of buying from you versus buying from the current vendor. What does your value proposition need to look like for them to seriously consider purchasing from you? If you are a new vendor, it might be something like: a pilot program; someone working at the plant; highly visible customers using this product; independent laboratory tests of the product; or a guarantee that reduces the level of risk.

Acting in silos. In many cases, sales, marketing and engineering are each in their own silo rather than aligning to meet the customer’s needs. Much has been written about this problem; little has been done. This is another practice that needs to be challenged and stopped. It requires a change in culture, a change of paradigm at the top and alignment of the desired goals and compensation.

Not collaborating on marketing materials. Marketing needs to listen to sales and to their customers to develop the right collateral materials. Are they effective? Do they help the customer? Do they help the sales process?

Relying solely on sales to push the product. Sales needs to have direction and input from marketing. Is the target market right? Is the value proposition right? Marketing should help drive customer acquisition and provide qualification criteria to the rep. In our opinion, the days of solely cold-calling and pressuring the customer to buy does not work. It is about relationships, diagnosing the problem and designing a solution that addresses the customer’s issues.

customer. I don’t care how good your product is; you cannot sell generators to the Amish community.

Assuming products will fly off the shelf without feedback from customers. Sometimes engineering is left alone to develop a next-generation product. That can lead to an offering with too many features or without certain functions customers view as critical. Or maybe all the new features make the product more likely to break down and/or make it more expensive. And then there is the opportunity cost of engineering’s time as well as revenue lost due to delays in market launch. We had a client that had its team of engineers working for several months on 32 features for its next-generation laboratory product. Once we did the market research we narrowed it down to four features, one of which the client did not initially consider. The product was finally commercialized and deemed a success.

Failing to reach out to your customers via talking and listening to them and combining that with voice-of-the-customer research. In my opinion, companies rely too much on web surveys and data analytics in B2B rather than developing a true qualitative understanding of what customers want. The insights give context to the data. A company should be engaging with its customers, not just surveying them to death.

The VP of marketing and the CMO should be spending a minimum of 10% to 15% of their time in front of key customers. Top customers should also have a representative from senior management calling on them and their senior management. Engineering and other functions should visit customers once a month. The goal is insight.

Close the feedback loop with your customers. Tell them, “This is what we heard. Here is what we are going to do.” Identify the key areas to focus on, prioritize and differentiate from the competition. You want to far outperform your competition on the most important criteria. Conversely, the

Not measuring key performance indicators or other metrics of customer satisfaction and loyalty on an ongoing basis. This, along with failing to improve in areas in which you are seen as deficient by your customers, can be a disaster. Utilize Net Promoter Score combined with other diagnostic questions. You should be constantly measuring to make sure you are making progress. You do this to delight your customers as well as identify customers who are not happy and could churn (thus potentially changing the trajectory of your relationship).

NPS has a poor reputation. There are three reasons for this. First, in many cases the concentration is on the score not the process to improve relationships. Second is the lack of actionable strategies and results. (To combat these two problems, NPS now also encompasses the Net Promoter System.) Last, CEOs are using NPS scores as vanity metrics rather than a tool for improvement. We think it is a very powerful tool to use across the organization. Implement actionable initiatives and then measure your progress over time. Rinse and repeat. It works!

Failing to benchmark to the competition. Determine how valuable certain functions and criteria are to your major customers. How do you stack up to your competition, to the best-in-class suppliers? What do leading suppliers in other industries do? What can we do to improve? Are we improving over time from the customer's perspective?

Not properly valuing (and funding!) your customer service department. Are you still treating customer service as a cost center? Paying incentives on the number of calls handled? Compensation should be based on how well they resolve the customer issue. Are you pooling all your reps until the next available rep answers, even for large customers? Large customers do not want to wait for the next available rep. They want the rep to know the issue and build a rapport. This has been verified in several research studies. Large accounts should have a customer service rep assigned to them. Use the pooled structure for the rest of the accounts to lower your costs.

Failing to identify why key customers have churned. Why did your major customers leave? Salespeople

will tell you it's pricing but research has found that accounts churn due to bad product fit and bad experiences/ not being serviced the way they want. A customer may be upset, disappointed or feel neglected. And you might be making the same mistake with others. When an account leaves, either the company or a service provider needs to identify the reason or reasons why. Don't guess; do the research and find out what drove the customer away. This is where you need to be engaged and have discussions rather than firing surveys at them to solicit ratings of your company.

Not conducting adequate marketing due diligence. When you enter a new market, do you have enough market intelligence to develop a successful go-to-market strategy? Have you conducted marketing due diligence for your M&A candidate companies by talking to their largest customers? Will they buy from you after the acquisition/merger? If a large customer leaves, you will be overpaying for the acquisition. The larger the threat or opportunity, the more you need market intelligence. It gives you insight to make more impactful decisions and helps you avoid making costly mistakes.

Not including customer input on your marketing and branding efforts. Branding and messaging need to be aligned with what customers think and be consistent over time, channels and platforms. Ad agencies race to design new logos and messaging frequently without getting input from customers. They want to wow their clients. Does this brand and messaging truly reflect your company and the experience customers have? What does the research say? Does the perception of the customers match the perception of senior management? Branding is more than the logo, colors and taglines. It is the emotional connection to our customers, the brand promise. How can you redesign branding without talking to customers?

Failing to consider the impact of the sales channel. One of the key reasons to buy from a distributor is to have one-stop shopping (buying many products at the same store). This is in addition to breaking bulk, immediate access to inventory, lower or free shipping, access to credit, etc. You need

to measure the power of the channel versus the power of the brand.

Do your customers ask for your brand and are they, for the most part, unwilling to change to another brand in stock? Or do they accept whatever the distributor has on hand? Do you have the right type and the right number of outlets? Where do your customers shop? We have found that there usually are not enough distributor outlets in an area as companies are afraid of channel conflict. While too much channel conflict (over 20% to 25%) may be destructive, some channel conflict proves you have enough channel outlets.

I was leading a research project years ago for a manufacturer of power tools. A big-box retailer told the company in a line review that if it did not receive more discounts and promotion money, the manufacturer would be thrown out in the next six months. We did over a thousand interviews with contractors and found out several things. First, contractors were very loyal to their preferred brand of power tool as the tools are an essential part of how they make their living. In fact, if the retailer did not have the brand in stock, they would go to another outlet over 80% of the time. Second, the contractor would typically spend \$200 to \$300 in addition to buying the power tool. So if the retailer did not stock these products, it would miss out on millions of dollars of power tool purchases and millions more in add-on sales. The retailer reluctantly relented and caved in on its threat.

Optimized with research

The above is not an exclusive list but it does show areas that can be better optimized with extensive research. Customer research can launch a product faster, leading more quickly to sales and profits. It can help develop go-to-market strategies that either get you a beachhead in the marketplace or increase your share of wallet. It can reduce churn and show you how to convert current customers into raving fans. We wish you much success in your marketing research activities. 📌

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••• advertising research

Tell to sell

Using the elements of moviemaking to drive video advertising impact

| By Eldaa Daily and Charles Young



snapshot

The authors use a famous VW spot to explore how storytelling and visual language combine to make effective video ads.

One way brands can project a premium image is by using high-quality production values in their advertising. That's why network-quality TV commercials don't look like homemade YouTube videos or PowerPoint sales presentations.

One common question that comes up in agency discussions about how to do early ad testing research is, "How do we measure the contribution that good production values make to overall ad effectiveness?"

"Production value" is a loosely defined term that could mean everything from the total cost of a video production to the net contributions that different artists make to the overall quality of the final execution: the storytelling, the acting, camera work, set design, music and sound, special effects, film editing and so on.

In this article we'd like to explore the different contributions that well-crafted moviemaking and skillful storytelling make to overall creative quality or ad effectiveness. In the case of the former, high-quality cinematography is key to attracting audience attention, while good storytelling is key to motivating consumer behavior.

Focus on KPIs

Most of the well-established pretesting systems have evolved over the past 30 years to focus on measuring the key performance indicators (KPIs) of attention, branding and motivation or persuasion. These are widely accepted report-card measures of ad effectiveness. And while different research systems measure these performance dimensions in different ways, the best systems have good histories of predicting various in-market tracking or brand lift metrics, such as brand awareness and product price/value perceptions. The ultimate goal being to predict sales performance and advertising ROI.



An interesting trend seen across many pretesting systems is that the attention and motivation measures are both important and generally uncorrelated – that is, they are independent variables that drive ad effectiveness.

From a diagnostic point of view, therefore, our next questions are: What are the creative variables that drive attention-getting power? What other creative variables drive motivation?

To answer these questions, many pretesting services use various rating statements to measure audience reactions to an ad. Respondents self-reporting on their own internal reactions to an ad can be a valuable source of insights into how an ad is working.

For example, at Dynata, by using our Ameritest system, we have found that entertainment, enjoyment, uniqueness and buzzworthiness are highly correlated with an ad’s attention score. In contrast, the relevance and credibility of the message and the relatability of the situation or characters, are the keys to a strong motivation score. Other systems report similar results. But rating statements collectively explain only about half of the

overall variability of a video ad’s performance on the key metrics.

Rating statements measure audience thoughts and feelings about an ad when viewed as a whole, or “gestalt,” experience. Something else is needed to get inside a video, measuring the internal dynamics of the video experience in order to provide actionable insights into why an ad performs well or poorly. For that reason, video-testing services currently provide a range of diagnostic moment-by-moment measures – from dial meters to eye tracking to facial response to EEG.

Our system uses three PictureSorts to peel back the different layers of creative quality: Flow of Attention explains attention and branding; Flow of Emotion explains motivation and branding; Flow of Meaning explains communication.

These are also the three keys for explaining and predicting the formation of long-term memories, the final cognitive step in the brand-building process.

Figure 1 illustrates how PictureSort data is correlated with the KPIs measured by the Ameritest pretesting system. This data came from a large CPG company that tested 65 ads. This collection of ads represents a wide range of executional types – from stand-up presenter to montage, humor to slice-of-life – and not just videos that used a narrative or storytelling format.

Figure 1 shows that the number peak or standout moments in the Flow of Attention graph is significantly correlated with attention scores but is not at all correlated with the motivation scores. Conversely, the Flow of Emotion graph is correlated with motivation but not attention.

This is because capturing audience attention and motivating a sale are both important psy-

Figure 1

Correlation of Picture Sorts parameters with Ameritest performance metrics

Performance Metrics	Flow of Attention		Flow of Emotion	
	FOA Average	Number of Peaks	Positive Emotion	Negative Emotion
Attention	-.05	.42*	-.08	.13
Branding	.36*	-.15	.19	-.24
Motivation	.08	-.16	.58*	-.57*

* Significant with 99% confidence

N=65 CPG ads tested
r=Pearson correlations

Figure 2

Flow of Attention



chological variables but they are controlled by different mental processes.

Surprising pivots

According to Aristotle, a story must have a beginning, middle and end. Robert McKee, author of a series of best-selling books on writing stories for movies, builds on Aristotle’s plot structure by positing that the elements of a story must include: an inciting incident (beginning); conflict/struggle to reach deepest desire (middle); surprising pivots in the plot (middle); and climax and closure (end).

It is as true now as it was in Shakespeare’s era that actors and writers are important for telling good stories. However, as McKee teaches, “[T]he love of a good story, of terrific characters and a world driven by your passion, courage and creative gifts is not enough. Your goal must be a good story well told.” And if you want to tell a good story using moving pictures, you need to master the art and craft of cinematography. You need somebody like Steven Spielberg in addition to Shakespeare.

Joseph Mascelli wrote the classic work on cinematography: “The Five C’s of Cinematography.” In his book, he shows how the five Cs mirror the human visual perception system:

- composition/framing – field of vision
- camera angle – point of view
- cut – blink/shift in attention
- continuity – coherence of action
- close-up – focus of attention

That’s why watching a movie can be such an immersive experience. When we watch a movie, a TV ad or a web video we allow another mind to

control our cinematic consciousness of the world of sight and sound that surrounds us. In the best cases, we allow someone else to direct our attention.

The Flow of Attention measures how the mind processes visual experience into memory. It’s based on a simple recognition test conducted a few minutes or even a few days after respondents have seen a video. Statistically, it measures the probability that any given image in a video will be remembered by the audience.

The Flow of Attention measures the rhythms of visual communication. As an audience watches a video, their minds sort images into long-term memory the same way you sort through your e-mail every morning as you decide which ones are important or not. The Flow of Attention reveals the ebb and flow of audience attention as each mind rapidly sorts through the stream of images flowing from a video.

Analyzing how the mind processes a movie is, in many ways, similar to the process of analyzing a piece of music. Like music, and like any other language, good movies rely on structure or form for clear communication. Well-crafted visual syntax and grammar in the visual language of film is important for controlling audience attention.

To predict whether a given video will be attention-getting, therefore, we must analyze the shape and the image content of this visual processing curve. This structural analysis of how well a video works as a piece of film is just as important in explaining a high or low attention score as having a unique, entertaining idea is.

An interesting characteristic of the Flow of Attention graph is that it really doesn’t matter who is in the audience.

We learned early on, from testing the same commercial in multiple countries for global clients, that the Flow of Attention graph for a video is consistent across countries, or even when comparing one target audience to another. That’s because Hollywood has taught the whole world how to watch movies in the same way.

If you look at the Flow of Attention line graph in Figure 2, you can see the results for one ad tested in four countries. As you can see, there is little variation from country to country despite strong cultural differences across these audiences.

From this, and hundreds of other similar tests, we have concluded that the Flow of Attention is measuring a universal property of the mind – how the working memory system in the brain processes the images in movies.

In contrast, the Flow of Emotion measures a different dimension of advertising engagement – emotional response, not attention or memory. This second PictureSort is based on sorting pictures into different categories, both positive and negative, which tells us how each respondent felt as they watched each image in the video.

story continues on page 64 >>>



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Messaging that connects: Bridging the gap between insights and creative action with behavioral science

SHRH Residential Holdings (Woodside Homes)



Insights teams often get asked to provide research guidance to drive messaging by uncovering consumer pain points, current states and desired end states. These hard-earned insights are handed over to creative with the goal of carrying insights through

campaign activation. However, there is a gap – how can creative teams scientifically translate insights into compelling campaigns that address irrational consumer decision making uncovered in research

In this presentation, we will discuss how Woodside Homes partnered with Newristics in applying its advance behavioral science-led solutions to align insights and creative teams to activate the most compelling copy. The programmatic and algorithmic application of Decision Heuristic Science provides campaign ready, scientifically perfected marketing copy in days based on insights sitting in your own research.

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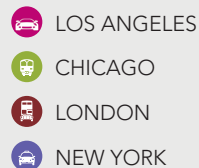
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Protocepting: Turning great ideas into great products

Johnsonville



No matter how well-written and -illustrated a concept is, it can be hard to know exactly what consumers are expecting.

Learn how Johnsonville shortened product development time with a new protocepting process which bring products to life and gets consumer feedback sooner in the product development process.

Future of work: Selecting optimal office spaces with location intelligence



Foursquare

FOURSQUARE

Modern business leaders are faced with difficult decisions about where to operate offices. While surveys may capture employee sentiment, a more reliable predictor of future behavior is empirical data showing where employees go in the physical world. With location intelligence, businesses answer key questions such as, how far are employees willing to travel to reach the office? Where do they go before and after – are they visiting nearby attractions? How do behaviors vary by city? Foursquare's Emily Owyani will share findings from a recent study and discuss how businesses make smarter site selection decisions with location intelligence.

Creating relevance with DIY customer panel

TechStyle Fashion Group



Finding the right customer groups to survey can often be time-consuming and dollar-draining. In this session, the speakers will showcase how TechStyle Fashion Group created a DIY, inclusive customer panel that has not only connected them more closely to the consumer but has saved them a lot of time and money. As a result of the customer panel that was created this year, the company has been able to turn around robust insights in less than 24 hours, amplify the voice of the customer to the organization and generate excitement and engagement among survey takers.

Growing a new and diverse customer base in the B2B world

Intuit

The session will highlight how QuickBooks is uncovering insights and using differentiated marketing techniques to grow their base of business with the diverse mosaic of new business owners who used COVID-19 as their reason to become their own boss. Specific insights on female, African American, Hispanic and first-time business owners. The presentation will be a mix of rationale for the move, insights collected from these audiences and specific in-field marketing tactics.

How PepsiCo is uncovering next-level insights with next-gen quant research

PepsiCo

So you've gone to the client-side

Tovala

Solving real-world business problems through creative research: A B2B case study

JPMorgan Chase

Additional sessions from:

Molson Coors, PepsiCo, Johnson & Johnson, Warner Bros., 3M, Intuit, LinkedIn, Mondelez, BT, Super Awesome, NatWest, Coca-Cola, Foursquare, WSAudiology, Pinterest, Morningstar, Inmarset, Mutual of America and more to come!

Storytelling hacks that will turn you into a reporting rockstar



Uncorking a Story



Our roles as researchers are to uncover insights that our teams can use for better decision making. But there's a big difference between research presentations based on facts and those that are told like stories. Last year we shared how authors and market researchers have a lot in common. This year we go a level deeper and showcase practical tips and tricks researchers can use to deliver compelling stories with their findings. Specifically:

- Overcoming self-limiting obstacles that you are not a "creative."
- How to find the core narratives in a sea of data using collaborative tools like Miro.
- Simple video editing hacks to make your clips more professional using tools like otter.ai and adobe premiere.
- How to present findings in visually stunning ways with tools such as Canva.

NETWORKING

FUN



MR Jam Session

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

Real Networking Technology

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



cocktails WITH QUIRK'S

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

Additional Networking

The Research Club and Women in Research (WIRe) will also be hosting networking parties during the events. Make sure to check out the Networking pages to learn of all the opportunities to connect with friends old and new.

Expo Hall Celebration

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



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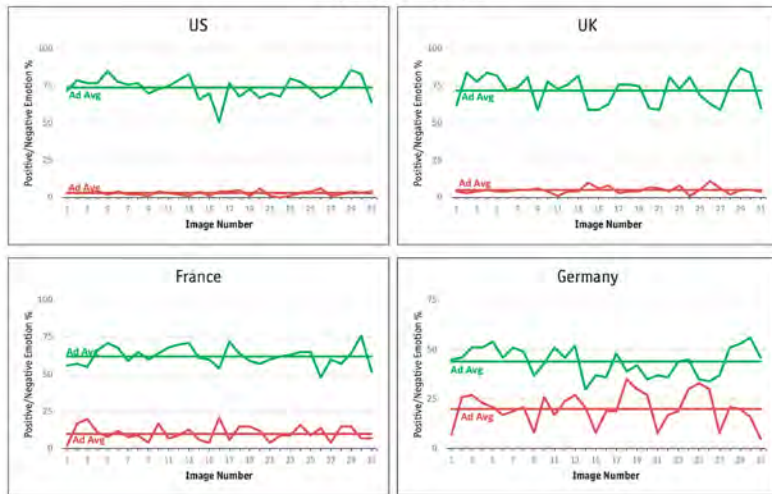
Below is a list of just some of the corporate brands that attend the Quirk's Event.



| A+E Networks UK | AAOS | AbbVie | Abcam | **Abercrombie & Fitch** | AbleTo | Accenture | ACCO Brands | ACH Food Companies, Inc. | Advance Auto Parts | Advocate Aurora Health | AETN UK | Ahold Delhaize | Alcon | Alcumus | Allergan | Allergan Aesthetics | Allianz Insurance | Ally | **Amazon Incentives** | American City Business Journals | American Egg Board | **American Express** | American Family Insurance | American Greetings | American Heart Association | American Honda Motor Co., Inc. | American Licorice Company | Amihan | Amway | Anthem | Arbonne | Arca Continental | Armstrong World Industries | Asahi UK | Astellas | Asurion | Auto Club of Southern California | Avanir Pharmaceuticals | Avast | Avery Products Company | Avon Cosmetics | Avtex | Away | AXA Health | B&C | BA | Bama Companies | Bank of America Merrill Lynch | Bank of Ireland UK | Barclays | **Bath & Body Works** | Bayes Price | BD | Beachbody LLC | BEHR | Behr Process Corporation | Bel Brands USA | Belkin | BET Networks | BHG Financial | BIC | Bio-Rad Laboratories | Blackhawk Network | Blistex | Blizzard Entertainment | **Blue Cross Blue Shield Association** | Blue Frontier | Blue Light Card | Bluedog Design | BNY Mellon – Pershing | Bobit | British Airways | British Gas | British Telecom | British Triathlon Federation | Brown-Forman | Brunswick Corporation | BSH Home Appliances | BT Group | Burberry | BuzzFeed | Cadillac Fairview | Cambridge University Press | Camelot UK | Campbells | Canadian Commercial Corporation | Canadian Western Bank | Cancer Research UK | Candy | Capital Group | Capital One | Caravan and Motorhome Club | Care.com | **Cargill** | Cars.com | CBS Radio | Center for Multicultural Science | Centrica | Centrica British Gas | Charles Schwab & Co., Inc. | Checkout.com | Cheesecake Factory | Chicago Blackhawks | Chick-fil-A | Chobani | Choose Chicago | Church Mutual Insurance Company, S.I. | Citi | CIVC | CKE Restaurants | Clear | Clif Bar & Company | Climate Corporation | **Clorox** | Close Brothers | Close Brothers Motor Finance | CNH Industrial | Colart | Colgate Palmolive | Collinson | Colpal | Combe | Comcast | ComEd | Compass Strategic Solutions LLC | Compeer Financial | CONMED | Consolidated Edison | Constellation Brands | Co-op | Corteva Agriscience | Coty | Coty UK&I | Covance Food Solutions | Coventry Building Society | Cox Automotive | CPW | Critical Mass | Cuisinart | CVS Health | Cynosure LLC | DAP Global, Inc. | DAZN | Del Monte Foods Inc. | Del Taco | Deliciously Ella | Deliveroo | Deloitte Consulting | DENTSU | DICE | DineEquity | Discovery Communications | DISH Network | **Disney** | Dollar Shave Club | Dotdash Meredith | **Dow Jones** | Dyson | Eastman | easyJet | Edmunds.com | Edrington UK | Edward Jones | Elkay | Ellevest | eMoney Advisor | Empower MM | Endeavor | Epsilon America | Epsilon Europe B.V. | Eurostar | Expedia Group | **ExxonMobil** | Ezentria | Facebook | Fairfax Hospital | Farmer's Fridge | Federal Reserve Bank of Chicago | **FedEx** Custom Critical | FedEx Services | Ferrero | Fidelity International | Financial Services Compensation Scheme | Financial Times | Flo.Health | Forever 21 | Fresenius Medical Care North America | Frontiers | Fruit of the Loom | Future | Future Publishing | Gasmart | Glanbia Nutritionals | Godiva Chocolatier | Gold Eagle | Goodstuff | Google | Gousto | Graebel Companies Inc. | Great Lakes Cheese | Greene King | Groupon | GSK | GSK Consumer Health | Guide Dogs | Halfords | Harley-Davidson Motor Company | Harry's | Hatted | Hawaiian Electric | **HBO Max** | Health Care Service Corporation | Healthfirst | H-E-B | HelloFresh | Herbalife Nutrition | Hi-Cone | High Liner Foods | HMRC | Home Improvement Research Institute | Home Instead, Inc. | Hometown Food Company | Honda Brands | Honest | Hormel Foods | Houghton Mifflin Harcourt | HSBC | Huckleberry Labs | Huel | Hulu | Hyundai | IBM | IEEE | i-Health | DSM | iHeartMedia | IKEA North America Services LLC | Indiana Farmers Insurance | Inmarsat | innocent drinks | Inspire Brands | Instant Brands | InterContinental Hotels Group | International Fresh Produce Association | IntoGlobal | Intuitive Surgical, Inc. | InVibe Labs | Iron Mountain | Irwin Mitchell | J. 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Figure 3

Flow of Emotion



The Flow of Emotion graph in Figure 3 is for the same test ad across the same countries. In these cases we now see a considerable amount of variation in audience response. The main reason for this is that the images in these ads have been filtered through three different cultural lenses, which produces strong differences in audience emotional response. (We should note that strong differences in cross-country emotional responses remain even after adjusting for differences in how different cultures use rating scales.)

Because of the different cognitive processes involved in controlling attention versus those involved in controlling emotions, there is little correlation between the Flow of Attention and Flow of Emotion graphs – just as there is a low correlation between attention scores and motivation scores.

While great stories will sometimes express universal themes of the human condition, in fact most storytelling – particularly ad stories – are quite local in their context and culturally dependent in their meaning. Stories typically teach us how to live in our everyday society, in our time and in our place.

So, it's important for audiences to identify with the characters and relate to the situations depicted in a video. That's the reason why Akira Kurosawa's "Seven Samurai" was remade in America as "The Magnificent Seven." And it's the reason Hollywood remakes hit movie stories from one generation to another, with a younger, more relatable cast of actors.

Case study: VW's Super Bowl ad

"The Force" is the commercial that introduced America to the new Volk-

swagen Passat a decade ago and is one of the most famous Super Bowl ads. (<https://youtu.be/3h6Hgn7Tvo>) For this reason, just about every pretesting company then in business tested the 60-second launch ad, so that the results obtained by different research approaches could be easily compared to the analysis that follows.

In the ad, we see a child wearing a Darth Vader costume trying in vain to use the Force on several things throughout the day – the family dog, a lunch plate, a toy doll. When dad pulls up in the driveway the boy runs outside and tries again to use the Force on the car. After the first attempt fails, the car starts up, much to the boy's delight and amazement. We then see a shot of dad clicking the remote-start button on the car's key fob from inside the kitchen.

One of the nice things about this case study is that the commercial contained no dialogue or voiceovers – just Star Wars music and a price card at the end. It's an excellent example of pure cinematic storytelling.

"The Force" generated a lot of brand awareness – and sold a lot of cars. In the Ameritest system the commercial scored in the 99th percentile of attention scores and scored nearly double the category average on motivation.

Part of the high attention score came from the positive reaction to the creative concept as a whole. The surveyed audience found the commercial entertaining, unique and relatable and they wanted to talk about it after it was over. The high motivation score stemmed in part from the ad's relevant message, newsworthiness and cred-

Figure 4

Flow of Attention

"The Force" :60



ibility. But the positive reactions to the overall concept and message were not the only things at work in the ad’s success.

Visually, you can see how audience attention flowed through the ad in Figure 4. In a Flow of Attention graph, the height of each picture gives the probability that image will be remembered a few minutes, or even days, after watching the ad. It reflects the output of the rhythmic cognitive cycles of perception that control attention, as our working memory system processes experience into long term memory storage.

The graph deliberately resembles notes of music plotted on a staff of written sheet music because working memory processes moving pictures and sounds in a similar way. It’s the same cognitive system that integrates the images and music in a piece of film – which is why we see these “waves” of attention. It’s also why we rarely watch movies without sound – the immersive effect of the film would be subverted.

With the attention graph, analysis focuses on the shape of the curve and content of the pictures. The absolute height of the curve is not a variable needed to predict attention scores.

For an ad to break through to a target audience it faces three cinematic challenges related to audience attention: grab it, hold it, focus it.

If you look at the first third of the graph for “The Force,” you can see a rapid build in attention as the execution grabs the audience and draws it in. The Star Wars music certainly plays a dominant chord in the opening sequence. It calls out to the target audience as the “Star Wars generation” – the age cohort that was then entering its peak family-car buying years. And the opening visuals trigger a double take – “That’s not Darth Vader, that’s a small child dressed as Darth Vader. What’s going on?”

The audience quickly begins to understand that Little Darth is on a quest for the Force or power. This idea is shown, in increasing steps of memorability, as the audience figures out that the child is determined to gain power – over the exercise machine, the family dog and the baby doll on the bed.

In the second movement, audience attention continues to engage as they watch his frustration and disappointment about having no power in his life. The mother in the kitchen tries to be supportive by “forcefully” sliding the sandwich plate over to Darth. It doesn’t help.

Finally, in the climactic third movement, the brand arrives in the form of a new car pulling into the driveway, the well-dressed father coming into the house. It’s during this part that the

least remembered image in the ad occurs: an interior shot of the dashboard, taken from the driver’s point of view. This image doesn’t fit the narrative up until now and so breaks the visual continuity in the flow of audience thoughts and expectations and thus is ignored.

Little Darth dashes past his dad to see if he has found a new source for power in his life. And this time he does – as the car roars to life at Little Darth’s command! The camera then shifts the point of view to the father and mother standing at the kitchen window watching, and with a closeup of a key, pulls back the magician’s curtain to reveal that the father started the car remotely.

And so, at the peak moment of audience attention, we see the payoff image – the reaction shot of Little Darth’s surprise at the awesome power he has just gained control of.

The movie closes with black title cards announcing “The all new 2012 Passat” “Coming soon” “Starting around \$20,000” “Das Auto.” And ends with the VW logo.

The Flow of Attention shows us what visual information audience attention is focused on as they watch this video. In addition to showing us if the visual structure supports the ad’s attention-getting power, this diagnostic

Figure 5

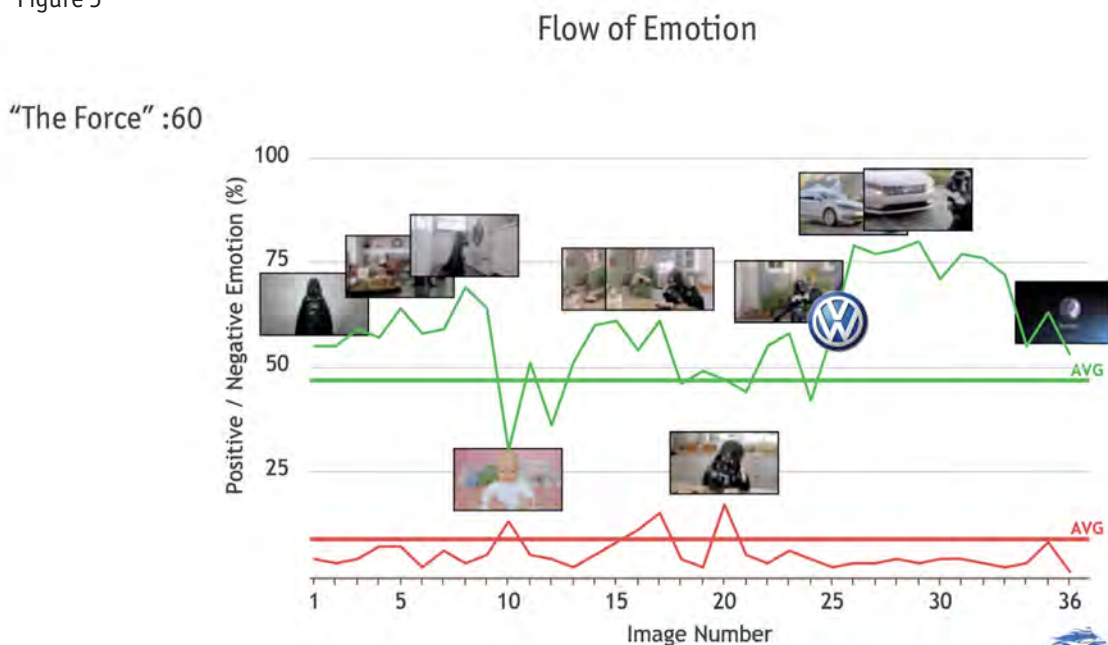
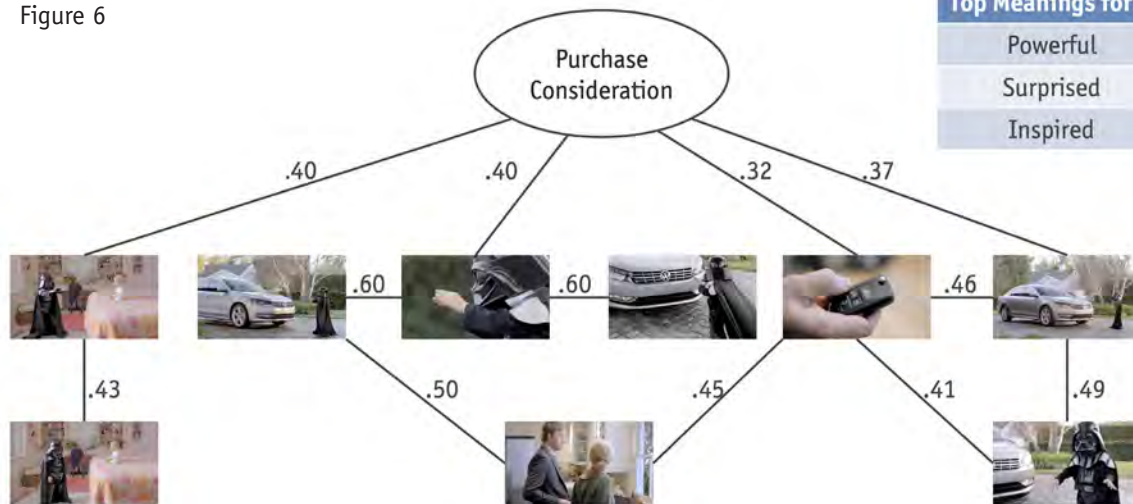


Figure 6

Top Meanings for these Images:	
Powerful	26%
Surprised	19%
Inspired	19%



information can be used for creating additional content. This information can help edit a video when creating shorter versions or can identify memorable images that can be used as thumbnails or be used as static images in digital display ads, out-of-home or print.

In contrast to the art of cinematography, storytelling is the art of using the language of any medium of communication to shape the emotions of an audience. Controlling attention is important only insofar as it allows the storyteller to control the emotions (and implicitly the behaviors) of the target audience.

In Figure 5 we can see how strongly the audience responded to the imagery in “The Force.”

Emotion graphs are interpreted in a different way from attention graphs. Analysis should be focused on the height of the emotion graph, which measures the intensity of self-reported response, and not the probability of remembering. As in calculus, the total emotional response to the whole video can be determined by calculating the area under the emotion curve.

Moreover, in analyzing the dramatic structure of the film, one should look at both positive and negative responses. As McKee writes, “Conflict is to storytelling as sound is to music.”

Good stories require struggle and surprise to be effective at moving people. In the case of negative responses, the important question to ask is, “Is the negative emotion evoked at this point

of the story intentional, by creative design, or is it unintended?”

For the first two thirds of “The Force” positive audience emotions are engaged at high levels by the action in the story, with small background notes of negativity as the audience empathizes with the frustrations and disappointments of Little Darth. These touches of negativity are there by design. Then, with the arrival of the brand, audience emotions take a quantum jump to a much higher positive level as the story reaches its climax and payoff.

According to the third sort (not shown), the Flow of Meaning, the arrival of the new car is the pivot of the story. It triggers a phase transition in the audience’s mental state – from thoughts and feelings focused on Little Darth’s determination and desire, blocked by disappointment and frustration – which then turns to the positive with Little Darth’s excitement and inspiration, sparked by the arrival of this new potential source of power, which is the final object of his quest.

Finally, we need to ask, “How did the thoughts and feelings evoked by this story impact consumer intentions to at least consider buying a new Volkswagen Passat?” And more generally, “What did this ad do to enhance perceptions of the brand?”

We can answer this by looking at Figure 6, which shows a simple model of the drivers of purchase consideration that we construct by examining the correlations across the various levels of attention and emotional response to the

images in the ad. We call these memory maps, which are like the Bayesian networks used in machine learning.

(For more information about memory maps you can read a March/April 2021 Quirk’s article about cross-channel testing called “Plotting the powerful pathways: The value of mapping brand memories.”)

This well-remembered set of six images, all significantly correlated with purchase consideration, represent the heart of the story. What do they tell us about why was this commercial so effective at selling cars?

Consider this analogy: If you want to appear “cool” to other people, you cannot just say you’re cool – because if you say it, then by definition you’re not cool. Similarly, given its historical brand positioning, Volkswagen could not believably claim that its new car was “powerful.” So the brand had to show it.

And so, by understanding how cinematography and storytelling each work, we can split apart the different cognitive processes that determine how attention and emotion work together to drive advertising performance and build branded memories. ¹¹

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6 TOP LOW- INCIDENCE RECRUITING COMPANIES

Identifying and recruiting low-incidence participants across a variety of industries for any research need can be challenging. Many struggle to recruit a real, trustworthy and reliable audience but finding one is key for a successful research project.

Whether you're looking for broad services or hoping to connect with niche audiences, these six companies will help you find hard-to-reach participants whenever you need them.

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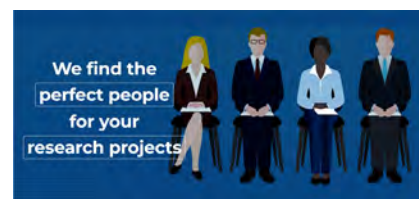


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Rare Patient Voice recruits patients and family caregivers (rare and non-rare) in the U.S., Canada, U.K., France, Germany, Italy, Spain, New Zealand and Australia for qualitative and quantitative research. We attend patient events to build our panels and have a robust referral program with almost 3,000 referral partners. We focus on recruiting only and can complete recruits within two weeks. Over 100,000 patients and caregivers across 700+ diseases are part of our community. Panels include all cancer types, Crohn's, cystic fibrosis, diabetes, epilepsy, Gaucher, hemophilia, lupus, mental health, multiple sclerosis, Parkinson's, primary immunodeficiency, sickle cell and spinal muscular atrophy. For a bid with feasibility and costs visit <https://pam.rarepatientvoice.com/>. To learn more about Rare Patient Voice visit <https://youtu.be/oOTCwMBvjpg>.



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CALENDAR OF EVENTS

●●● can't-miss activities

Insights Association will host its 2023 CEO Summit Miami on **January 23-25**. Visit www.insightsassociation.org/Events/Event-Info/sessionaltcd/2023CEOSummitMiami.

Quirk's Media will host Wisdom Wednesday on **January 25**. Visit www.quirks.com/events/wisdom-wednesday-webinars-january-25-2023.

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.

Greenbook will host IIEX Asia Pacific on **February 7-8** in **Thailand**. Visit events.greenbook.org/iiex-asia-pacific/page/2322195/about.

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** in **Berlin**. Visit www.ux360summit.com.

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

We.CONECT 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.

SampleCon will host SampleCon 2023 on **March 6-8** in **Pasadena, Calif.** Visit samplecon.com.

Quirk's Media will host Wisdom Wednesday on **March 15**. Visit www.quirks.com/events/wisdom-wednesday-webinars-march-15-2023.

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.thequirkseven.com.

Quirk's Media will host Wisdom Wednesday on **April 12**. Visit www.quirks.com/events/wisdom-wednesday-webinars-april-12-2023.

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

Insights Association will host its 2023 Annual Conference on **April 24**. Visit www.insightsassociation.org/Events/Event-Info/sessionaltcd/2023ANNUALCONF.

ESOMAR will host ESOMAR Latin America 2023 on **April 23-25**. Visit esomar.org/newsroom/latin-american-call-for-speakers.

Fortem International will host Call & Contact Center Expo on **April 26-27** in **Las Vegas**. Visit www.callandcontactcenterexpo.us.

Sawtooth Software will host Analytics & Insights Summit on **May 2-5** in **Barcelona**. Visit events.sawtoothsoftware.com/barcelona-2023/overview.

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

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

Informa Connect will host its Front End of Innovation (FEI) event on **May 16-18** in **Boston**. Visit informaconnect.com/feiusa.

Event details as of December 1, 2022. Please see websites for more details.

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10 minutes with...

Rachel Pruitt

Director Operations and Capabilities, Enterprise Insights
Target

What led you to a career in research and insights?

I've always been both analytical and fascinated by human behavior. I think a lot of that stemmed from – or was strengthened by – the fact that I grew up with Deaf parents and was always shifting between the Deaf and hearing worlds. I loved observing the differences in culture and behavior and trying to figure out why people do what they do.

When I got to college, I ended up studying finance, satisfying my analytical side, and psychology, satisfying my interest in people, but wasn't quite sure what that meant in terms of a career. Out of college I took a role as a financial analyst at General Mills. A couple years into my time in finance, I began working with a cross-functional team on Pillsbury Innovation, and it was there I discovered the world of insights.

That was the big unlock for me – a career that combined analytics and human behavior, a career spent analyzing people and why they do what they do. I was hooked and fortunate enough to have had the support of the organization – and a couple amazing individuals in particular – to make the transition to insights. And for that I am forever grateful.

Do you have any tips for researchers looking to drive influence with business partners and ensure insights are not only shared but also acted upon?

Yes! I'm so passionate about this topic. My biggest tip? Apply what you're already skilled at doing as a researcher to your business partners. Build empathy for them, understand their needs, what they care about, what influences them and why. Then figure out how you can help them. Do they need information to help make a decision? Do they need insight to illuminate the path forward? Do they need something they don't yet know they need? Just as consumers can't always articulate their needs, our business partners don't always know what they need or should be asking for. When we proactively bring forward what matters – vs. just answering questions we receive – we play a role in setting the business agenda and strategy and become true business partners.

And to ensure insights are not only shared but also acted upon, think about some of the principles of advertising. Just as consumers need communication that captures their attention, is relevant and clear, so do our business partners. It's our job to figure out what's most relevant to them, and to share that in a clear and concise way that makes them want to "buy" what you're selling.



“My biggest tip? Apply what you’re already skilled at doing as a researcher to your business partners.”

Scan to read the full article at www.Quirks.com.





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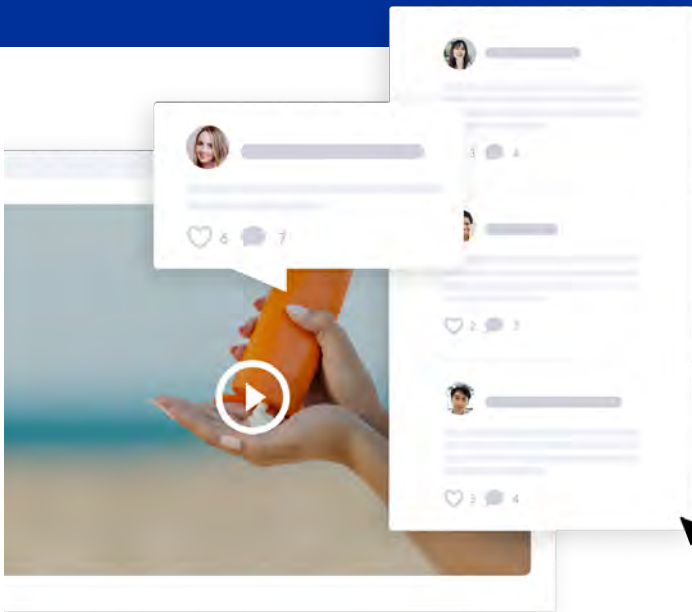
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