

QUIRKIS

For marketing research and insights professionals

THIS CHANGES
EVERYTHING—
RIGHT?

ChatGPT
and its impact on
marketing research



PLUS

What's driving the growth in plant-based foods?

Why political parties can't overlook Asian Americans

Making research a renewable resource

ADVERTISING SECTIONS

12 Top Full-Service Research Companies

16 Top Panel Research Companies



Quirk's Marketing Research Review

MARCH/APRIL 2023

VOLUME XXXVII NUMBER 2

WWW.QUIRKIS.COM



A Letter to The Industry

Our business started 56 years ago around Sarah Schlesinger's kitchen table, inviting people into her home to talk about their experiences, perceptions, hopes and desires. While directly supporting some of the founders of our industry—George Gallup, Dan Yankelovich, Louis Harris—Sarah built a reputation and a business founded on integrity, quality, and the belief that genuine human connection can yield deeply impactful and unanticipated business insight.

As the industry evolved over the decades, so did we—finding new ways of gathering and delivering information to understand the human condition at the speed of business. We've invested in transformative research technology and amassed some of the industry's brightest minds to provide clients with connections to millions of humans around the world through an adaptive suite of research solutions.

We've transformed and evolved as a company and to reflect on that transformation, it's time to evolve our name. That's why Schlesinger Group is now Sago. Our new brand reflects the speed, simplicity, and action we want to demonstrate in helping our clients in this new age of insight.

As we evolve, the heart of our business remains centered around Sarah's kitchen table, believing in the power of the human voice to inform, illuminate and lead. Our use of advanced technology at every stage of the research lifecycle will always be in the service of elevating human insight to answer business questions.

We'd like to think that Sarah would be proud.

Ready for answers? Just say go. #JustSago



Reed Cundiff
CEO of Sago



Steve Schlesinger
Executive Chairman of Sago

sago.com

SAGO

Formerly  SCHLESINGER
GROUP



SÄGO

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Just say go!

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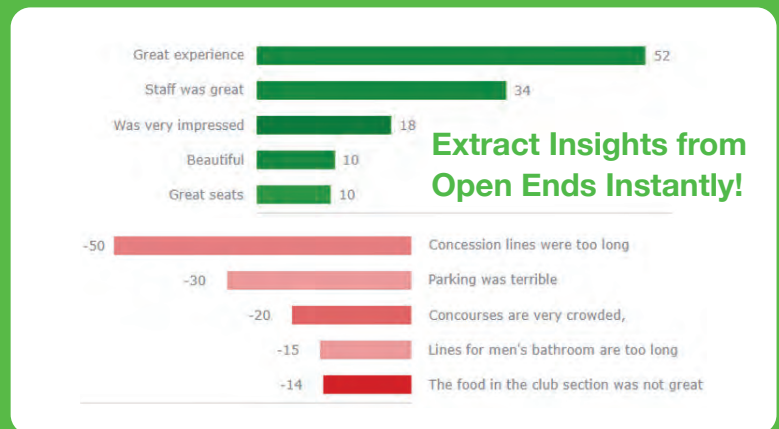
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CX Inspector

New! CXI Go with Theme Extractor Instantly Find Top Insights from Open Ends

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online, e-newsletter and blog highlights

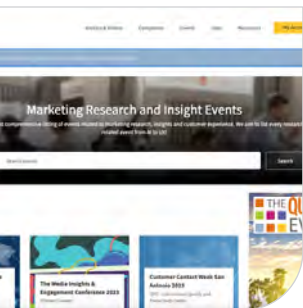


The Quirk's Events continue in Chicago and London!

The 2023 Quirk's Events are off to a great start. Next up are:

- Quirk's Chicago – March 27-28.
- Quirk's London – May 3-4.
- Quirk's New York – July 19-20.

You don't want to miss out on great sessions, fun networking events and all the experiences you get at the Quirk's Events! Plus it's a great way to get your entire team together in one place for a great price. Find out more and register at www.TheQuirksEvent.com.



Comprehensive industry event calendar

Do you have a hard time looking for a list of all industry events in one place? Quirk's has a solution for you! On our website you can find a comprehensive list of all industry events for free. Find events by date and add them to your calendar straight from the website. Check out the event page by going to www.quirks.com/events.

E-NEWSWORTHY



Online fraud in marketing research: Tips for taking action now

bit.ly/40kNezI



The human experience: How Consumers are reshaping marketing research in 2023

bit.ly/3WPDDOD



U.S consumer sentiment and behaviors: 4 trends to watch in 2023

bit.ly/3kYyYwl

NOTED POSTS



QUIRK'S BLOG

Elevating survey data quality: Q&A with Research Defender
bit.ly/3RIWr6r

Q&A: L'Oréal and InSites Consulting on what makes their insights partnership strong
bit.ly/3Jt9KQT

How to conduct marketing research with health care practitioners
bit.ly/3XSgKLo



RESEARCH INDUSTRY VOICES

Examining the five environmental types
bit.ly/3wGCTAv

The advantages concept testing with surveys
bit.ly/3WWD6tQ

What to expect from the marketing research industry in 2023
bit.ly/40jrQKQ



RESEARCH CAREERS BLOG

Creating an effective workplace environment for all employees
bit.ly/3kV1j6G

Choosing a career in the marketing research and insights industry
bit.ly/3jdjYKt

How to attract and maintain marketing research professionals
bit.ly/3kYAObk



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In Case You Missed It

news and notes on marketing and research



••• food research

Consumers not sour on gene-edited grapes

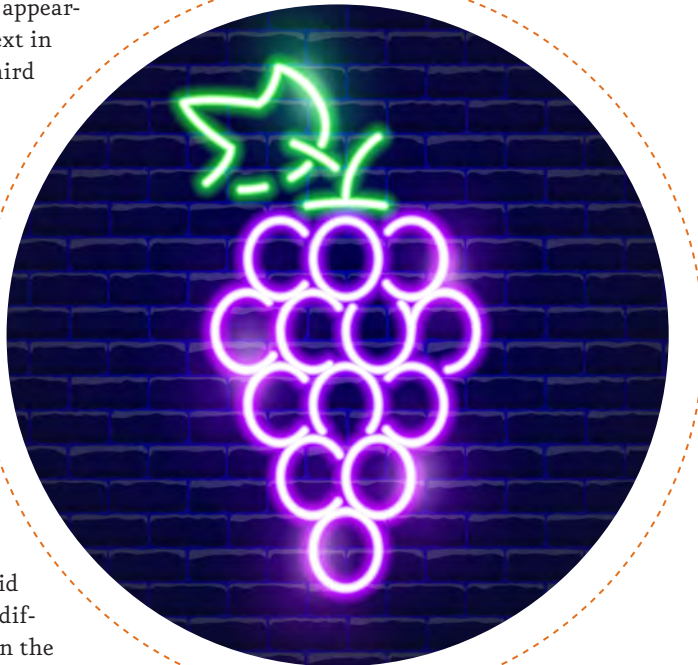
Despite some hesitation about gene-edited foods, taste trumps everything, according to a Washington State University-led survey of U.S. consumers.

For a study published in the journal PLOS One (“Consumer acceptance of new plant-breeding technologies: An application to the use of gene editing in fresh table grapes”), researchers surveyed more than 2,800 people across the U.S. to assess how accepting they might be of gene-edited table grapes, even though none are yet on the market.

After taste, appearance ranked next in importance. Third was a preference for fewer pesticides and fourth a slight preference for traditionally bred grapes over gene-edited ones.

More than half of the survey participants said they knew the difference between the gene-editing technology CRISPR and genetic engineering but they couldn’t state what exactly that difference was.

The researchers segmented the participants into four groups depending on their level of acceptance of gene editing. One group, representing 22% of the participants, who were the most accepting of gene editing, were also the most informed and trusted many sources of information, ranking scientific sources the most highly. The group that most strongly rejected gene editing, about 16% of respondents, knew the least about the technology and had little trust in any sources of information including scientists, government and the media. The other two groups were seen as slightly or moderately rejecting gene editing.



••• consumer psychology

‘Meh’ toward the algorithm

Customers feel good about a company when its representatives make decisions in their favor, such as approving their loan application or granting upgraded member status. When an algorithm reaches the same favorable conclusion? Not so much.

In a Journal of Marketing Research paper (“Thumbs up or down: consumer reactions to decisions by algorithms versus humans”) examining how customers react differently depending on whether a computer or a fellow human decides their fate, Wharton marketing professor Stefano Puntoni and his colleagues found that customers are happiest when they receive a positive decision from a person, less happy when the positive decision is made by an algorithm and equally unhappy with both human and machine when the news is bad.

The researchers believe the results can be explained through attribution theory, a psychology term that refers to how people translate their own experiences and perceptions to make sense of their place in the world. Simply put, it is easier for consumers to internalize a favorable decision outcome that is rendered by a human than by an algorithm, believing that, for example, when a company representative greenlights a request, it’s because of the customer’s exemplary behavior, social status or excellent credit score, etc. But it is easy to externalize an unfavorable decision outcome regardless of whether the decision-maker is human or a bot.

IT'S A GREAT DAY FOR
DISCOVERING WHY



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Tracking Studies



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I'm already sick of ChatGPT

Is it too early to be bored with ChatGPT? I realize this issue's cover story is about ChatGPT and I'm the one who decided to put it there, so I'm just adding to the mania. And maybe it's just a reflection of the speed and totality with which trends/fads/hot new things spread these days. Or the fact that generative AI has the potential to impact all aspects of our lives.

But it all just seems a bit ... much.

True, after reading David Boyle and Richard Bowman's piece in this issue, it's hard not to be excited, especially if, as they outline, the technology frees researchers from drudgery and lets them focus on adding value by bringing insight and context to ChatGPT's output.

And if the technology is used properly (and its errors corrected, etc.), I don't see a problem with it, but I've found some of the commentary on LinkedIn and elsewhere about what ChatGPT means for thought leadership to be laughably wrongheaded. Generating thought leadership will be a breeze, this thinking goes, because you'll be able to harvest all the best writing on whatever topic you want, basically at the push of a button! Yeah, I guess. But so will everybody else with the same goal!

The whole point of thought leadership – good, worthwhile thought leadership, anyway – is that its creators bring something new or insightful or valuable to the process and help you see a problem or a topic in a different light. Rely on ChatGPT for generating your thought leadership

and all you'll get is a potentially error-filled, unoriginal rehash.

Fortunately, it sounds like consumers are approaching all of this with level heads. Market research cloud company Suzy surveyed 1,000 people for its report Unveiling Consumer Perceptions of Generative AI and found that just over half (53%) were comfortable with AI in the products and services they already use. Over a third (35%) were aware of AI tools when asked about specific offerings and the top three cited were Grammarly (26%), ChatGPT (12%) and DALL-E (9%). As for what they use AI tools for, respondents cited improving work efficiency, organization and time management, encompassing tasks such as scheduling, creating documents, summarizing documents and generating reminder messages – all fairly quotidian tasks that lend themselves to some form of automation.

Some marketing research industry commenters have expressed fears similar to those voiced around the time big data was on the rise that, just as big data would make researchers irrelevant because companies now have all the data they need to make decisions (and thus why bother to pay for someone to go out and gather it, etc.), generative AI will also render insights pros moot by making report-writing something anyone can do with very little effort. As it turns out, data can't analyze itself or make business recommendations. You actually need people for that, and not just any people but those who are trained to know



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what to look for. So I don't see ChatGPT as displacing marketing researchers any time soon.

As someone who writes and edits for a living, perhaps my feelings about ChatGPT are just a form of whistling past the graveyard. I'm probably setting myself up to be a punchline when I'm eventually replaced with a generative AI editor and I know the technology will quickly evolve to be able to catch and correct (or avoid completely) the errors that currently dog ChatGPT output.

And after seeing how dangerously close the U.S. came (and may come again, depending on the next presidential election) to being overrun by blinkered, demagogic thinking, I'm under no illusions that this type of information generation has only beneficial applications and outcomes. But I'm hopeful that it will be seen and used for what it is: a time-saving tool that takes full advantage of computing technology's ability to extract useful information from the internet's digital morass (especially in light of Microsoft and OpenAI's reimagining of the Bing search engine), freeing people up to do the more valuable work of adding insight, analysis and, dare I say it, a bit of humanity to the end result. 🗣️

••• advice for researchers

ASK THE EXPERT

Expert answers to important research questions.

How can we elevate 'omnichannel' to more than just a buzzword in our work?

Fortunes are spent annually by brands and retailers of all sizes to understand how consumers make buying decisions. However, most researchers overlook the crucial aspect of how shopping method dramatically impacts the WHY of what retailers and brands people choose.

The buzzword "omnichannel" abounds in research and strategy briefs. While shopper understanding usually focuses on where and how they're acquiring things, it can go further to unlock the WHY of real-life decision-making.

The way of getting something – in the haze of the omnichannel – dictates everything from which fast-food restaurant you visit to whether you'll try a new beverage to the snacks you buy for your household.

Months back a busy colleague was lamenting the hassle of having to grocery shop for the household. I asked if she had tried click-and-collect or delivery. Her response: "No, but I'm definitely going to do that. I don't know why I haven't yet. That's so obvious." Cut to a couple of weeks later:

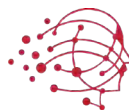
Me: "Did you try grocery delivery or ordering ahead?"

Her: "No..."



Hunter Thurman

Founder and President
www.alpha-diver.com
hunter@alpha-diver.com



ALPHA-DIVER

Me: "I thought that was the answer to your struggle?"

Her: "It is; I'm doing it next time."

A couple weeks after that:

(Same scenario)

Her: "I don't know why! I'm just going to keep going to the d@&% store, OK!?"

The infamous "say/do gap." Digital shopping would seemingly ease her struggle and yet she didn't act. This leads to the three macro shopper mind-sets when it comes to food in general:

1. Bricks Bound – Loyal to brick-and-mortar, 48% of shoppers.
2. E-Com Enthusiasts – Prefer e-com shopping for food, 20% of shoppers.
3. Fence Sitters – Could be persuaded either way, 32% of shoppers.

This gets to my point about the key to understanding context to diagnose the WHY of consumer behavior.

Bricks Bound shop this way because it gives them CONTROL over the experience (no substitutions, delays, other people choosing their avocados). This is why my friend never made the switch: while she thought time and effort were her struggle, it was actually about control over the process.

E-Com Enthusiasts shop in this way because it empowers them to discover and explore (NOT because it saves money or merely reduces effort).

In short, the context in the minds of consumers – not merely the where and how of shopping – defines the decision-making criteria. Shopping context is a major factor overlooked in most marketing organizations. As you plan your studies and assess opportunities, be sure to check assumptions at the door and dig deeply into not just the behavior, but the fuel behind it.

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.

INNOVATIVE PRODUCTS & SERVICES



Methodologies, techniques and technologies are rapidly changing in the marketing research and insights industry. With new products and services constantly being released, how can you keep up with what is new? Quirk's has you covered. In this section, you will find some of the newest and most innovative tools and services to keep your research up to speed. From the latest in software, technology, methodologies and services, these are the products and services you will want to know about.

Encourage your instinctive intellectual curiosity while advancing your insights



Your time will be completely wasted if you choose to collaborate with organizations that do not put a high premium on the accuracy of the data they provide. Catalyse Research will only work with its own state-of-the-art proprietor panel pocketsinfull.com to fulfil the vast and varied needs of our clients. In addition, as a continuous part of our commitment to quality assurance, we conduct performance assessments on the panelists to maintain the quality throughout the year. These evaluations take place systematically and in a periodic manner.

Introducing Catalyse Research's DIY platform

Our platform does everything. Find and divide your target population, create sophisticated and exhaustive surveys and then gather and arrange the results

of your research to propel forward your ideas. There has never been a time when comprehensive lifecycle information was so easily available.

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Panels with a specialized focus

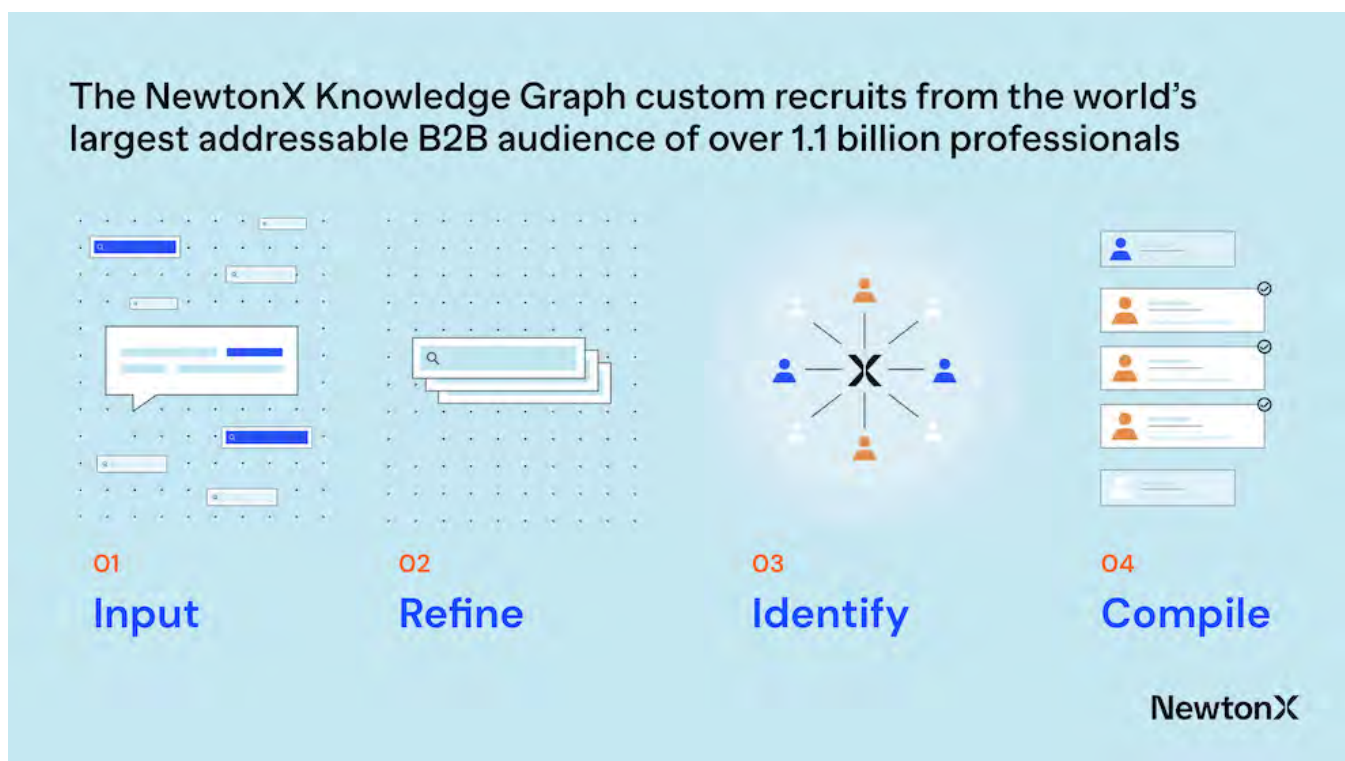
- Senior management (C-suite executives at SMBs or large corporations).
- Panels that are peculiar to the field (e.g., IT decision-makers, HR decision-makers).
- Panels on health care (nurses, doctors).

plunge into unknown

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<p>ML Concept Testing 70% Completion 200/1000 Quota</p>	<p>AI Assisted Shelf Testing 100% Completion 500/500 Quota</p>	<p>Kano Analysis 50% Completion 150/300 Quota</p>
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The NewtonX Knowledge Graph

Unlocking access at scale to B2B expertise

It's notoriously hard to find a representative sample for many B2B research use cases. That problem has now been solved with the NewtonX Knowledge Graph and its ability to find niche audiences at scale.

It addresses where traditional expert networks and closed panels fail: they don't cover enough expertise to account for any potential audience a client could request. You would need millions of panel respondents to be prepared for any combination of audience specs.

The Knowledge Graph — our search engine for people, specifically B2B professionals — turns that system on its head. It's the central element in our custom recruiting process, which finds the exact professionals that leading enterprises need critical insights from. Rather than pull from a closed pool of respondents in a traditional panel, we developed the Graph that sources from an open network of 1.1 billion B2B professionals across over 140 industries. Our AI provides a level of granularity unheard of in B2B market research.

How it works

1. **Input:** We take your business question and translate it to an advanced query composed of over 40 distinct search fields. We're able to account for geography, product knowledge, seniority and more.
2. **Refine:** We then string together multiple fields to ensure you're speaking to the right audience. Looking for CRM software decision makers who work at Fortune 500 health care companies? We'll find them.
3. **Identify:** The final query is then pushed out through our API to scan professional networks and any other sites with publicly available profiles.
4. **Compile:** Before reaching out, we assemble a targeted list of professionals, ensuring you get the largest possible reach without compromising specificity.

We don't put out a mass call for responses from a large pool of any-

NewtonX

mous people who were not ID-verified. Rather than weeding out the wrong respondents, we precisely target the right people in the first place. We know who they are before we even send them a survey. Our rigorous selection process allows us to find verified professionals who meet any number of specific criteria. As a result, the Graph enables zero fraud in the data.

It has fueled critical business decisions for leading organizations like Microsoft, Salesforce, McKinsey, Pinterest and Figma. It's provided insights for Fortune, Adweek and GreenBook's GRIT to help field research that advances the insights industry.

It's the new source of truth for B2B research data.

www.newtonx.com/leading-b2b-market-research-company

New CXI Go with Theme Extractor

A simple solution that instantly extracts valuable insights from open-ends

Do you have open-end comments you wish you could analyze but don't have the time, money or right solution? CXI Go with new Theme Extractor technology is a DIY text analytics solution which quickly identifies the top insights from text comments with minimal cost and effort.

- **Load to insights:** Load your file with one click and charts immediately appear identifying the top insights. Then easily export the data and visuals.
- **Instant themes:** Our new Theme Extractor reveals the top ideas immediately, a big step forward from single-word topics that require deeper digging.
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- **Click through** the insight to see individual responses.
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InnovateMR + Ivy Exec

As research is advancing, new methodologies are required to keep up with the changes in the B2B landscape. Thus, quantitative and qualitative mixed-methodology research is in higher demand now more than ever. InnovateMR, an award-winning full-service research firm, remains an innovative leader for the future needs of the insights industry. While InnovateMR will continue to bring high-quality data and fast quantitative results to clients, we are excited to announce that we now also offer qualitative services.

Our acquisition of Ivy Exec, a leading expert in qualitative B2B research, enables us to offer both quantitative and qualitative services as well as extensive B2B research capabilities all under one roof. This combined offering will provide clients with the opportunity to gather in-depth insights from experienced professionals including C-suite executives and other highly specialized subject-matter experts across various high-demand verticals.

Gain access to 3 million+ resume-vetted professionals in 191 countries (including 800K+ executive women and 500K+ C-suite members) through the following research methods:

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- Event and roundtables
- Ethnographies
- Panels and samples

innovateMR

- In-person and online focus groups
- Translations and transcriptions
- Online surveys
- Trackers
- Data analysis
- Multilingual moderation
- Programming

Together, InnovateMR and Ivy Exec will support our partners seeking to gain insights, working to connect them with B2B decision-makers, subject matter experts and key opinion leaders.

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A complete experience management platform

Next-gen features include 250+ expert-designed templates, skip logic application, multilingual surveys in over 80 languages for a higher response rate, access to a high-potential and diverse audience, efficient field management

tools for conducting surveys in remote/no-network areas, real-time updates via e-mail triggers, unique parameters to limit/prevent biased responses and an easy and quick analysis of open-ended text responses with creative analysis tools. Obtain precise data, make informed decisions and share custom reports with stakeholders.

Enhance the customer experience (CX)

Create a positive CX and understand customer behavior by conducting constructive VOC studies with Zoho Survey. Provide a quality web/store experience by facilitating positive interactions at every customer touchpoint. Zoho Survey equips you with NPS, rating-scale and matrix-type surveys through pop-ups and inline e-mails to identify the "why" behind your customers' decisions and actions. These insights empower you to build an intuitive product and provide seamless support.

Survey also helps you determine the perfect branding and marketing strategy for your business with marketing research and A/B testing. Access exclusive white-label solutions with mobile-friendly options for conducting studies anywhere and anytime. Provide enticing reward options to reduce respondent dropout rates. Conduct an in-depth analysis of your data with extensive reporting features. You can even create crosstab reports to find a correlation between two questions and identify trends that may otherwise go unnoticed.

For easy sharing, Survey lets you export your reports in multiple formats. Tap into the potential of unstructured data with sentiment analysis and word cloud features. Understand the emotions of your respondents at-a-glance.

Redefine the employee experience (EX)

Zoho Survey helps you obtain open and genuine feedback through employee engagement surveys. Empower your leadership staff with insights that go



beyond performance metrics. Assess employees with ongoing performance evaluations and effectively target business development and interpersonal skills with training surveys and timed quizzes. Likert-scale feedback and employee wellness surveys offer a holistic approach for understanding employee mind-sets while workplace and HR satisfaction surveys help you combat attrition rates. Conduct ENPS surveys to measure employee satisfaction and culture initiative impacts on employee mind-sets. You can easily synthesize the data into meaningful insights and presentable dashboards for management and board members. If you're planning to attract new talent, streamline your hiring process through psychometric tests and online assessments during candidate recruitment and interviews.

Offline survey solutions

Conduct offline surveys in low- or no-network areas, collect responses from anywhere using our offline apps on Google Play and App Store.

Fuel your strategies with powerful Zoho integrations like CRM, Analytics, Campaigns, Desk, Recruit and more. Discover our multitude of helpful features that pave the way for high-quality research and experience management that is both cost- and time-efficient. Visit us at www.zoho.com/survey. For a free consultation with our CX and research management experts contact us at sales@zohosurvey.com.

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For candidates

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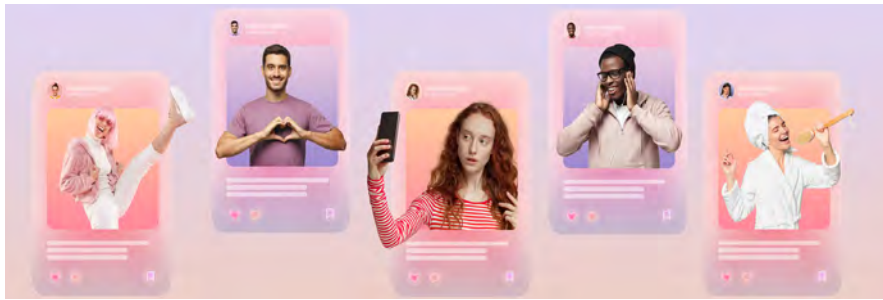
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... social media research

Influenced on Instagram

Brands seek sweet spot of relevance without annoyance

Companies have found ways to make a name for themselves on social media platforms but are users fans of their content? In a study of Canadian consumers, research firm Leger and digital performance agency Ressac found that while brands attempt to increase their platform engagement, most struggle to find the proper balance to keep users subscribed.

Social media has become a home for brands that target their audience via their account feed or branded content and advertisements. Thirty-seven percent of Canadians say they follow a brand or company on their personal accounts. On Instagram, 78% of people in the 16-34 age range, 54% of 35-54-year-olds and 30% of those over 55 follow brands. Forty-two percent of 16-34-year-olds, 73% of 35-54-year-olds and 75% of people 55+ follow brands on Facebook. Only 13% of users follow brands on TikTok.

While many users follow brands online, 81% say they hit the follow button after having an in-person experience with them. Eighty-seven percent of people over the age of 55 say they followed business pages after browsing

their websites. Many brands or business pages struggle to gain and maintain followers. Seventy percent of 16-34-year-olds say they unfollow brands because their content is not interesting. Twenty-one percent of respondents say they unfollow because they do not want to be associated with the brand and 50% unsubscribe if their values don't line up. Business and brand accounts are often on a slippery slope, wanting to establish a presence without being omnipresent. Fifty percent of respondents say they will unfollow an account if they post too much and 11% say they will unfollow if they don't post enough.

Seeing advertisements on personal accounts is often disliked. Seventy-eight percent of those surveyed say they avoid ads by using an ad blocker, a private browser or another way to prevent them from popping up. Fifty-five percent of 16-34-year-olds and 32% of people 55+ say they're willing to pay for ad-free media and streaming.

While most social media users don't enjoy advertisements, the following of influencers and content creators, who often promote brands and businesses, has continued to rise. Ten percent of

people 55+, 33% of 35-54-year-olds and 59% of 16-34-year-olds follow social media influencers. Influencers can target any age group and a broad spectrum of hobbies. Twenty-four percent of the Canadian respondents follow sports personalities, 20% follow reality TV stars, 34% keep up with international artists and 24% subscribe to activists or people who advocate for causes they care about.

While some platforms have come and gone, others have had a longer run. Eighty-three percent of Canadian internet users have a Facebook account. Fifty-six percent of 16-34-year-olds, 73% of 35-55-year-olds and 70% of people over 55 use Facebook daily. Twenty-six percent of respondents over the age of 34 say if they could only keep one platform they would choose Facebook while 20% of the younger generation list Instagram as their top choice. Following Instagram, 17% of 16-34-year-olds say they enjoy Messenger and 14% prefer YouTube.

While most social media users have one personal account per platform, almost one in five Canadians say they have more than one account on various platforms. Forty-five percent say they have multiple accounts to keep certain aspects of their life private and 26% say their accounts are for different groups of people. Twenty-four percent say they have more than one account to see content without being recognized or to stay anonymous and 32% say each of their accounts has a different theme.

Leger and Ressac conducted this research with 3,000 Canadian internet users aged 16 or older. The data was collected from August 1-12, 2022.



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Ethical fashion
 is in

The rise of sustainable shopping

Despite the popularization of ethical fashion, fast-fashion consumption is booming among Gen Z. While it is often the more affordable clothing option, especially for younger individuals, the growing awareness of its environmental harm and unethical

labor practices have increased support for more sustainable options. Research firm Momentive found that while Gen Z are gaining interest in sustainable practices, the majority have purchased clothing items from fast-fashion companies.

In the past year, 56% of Gen Z have purchased items from large fast-fashion brands. The most popular brands among Gen Z include H&M (33%), Shein (27%), Forever 21 (21%) and Zara (11%). Forty-one percent of Millennials, 24% of Gen X and 10% of Baby Boomers also purchase clothing from fast-fashion brands. Although the purchasing rates of fast fashion have increased, ethical fashion is also on the rise. While many question whether sustainable clothing will become just another trend, many support purchasing more ethical options.

Consumers are aware of the ethics behind their purchases and have varying opinions on which factors they prioritize. Forty-eight percent of

18-34-year-olds, 51% of 35-64-year-olds and 55% of people 65 and older believe it is very important that their clothing be made without harmful chemicals. Older individuals find it the most important for their clothing to have been made using ethical labor practices, with 50% believing it is very important, compared to 44% of 35-64-year-olds and 39% of 18-34-year-olds. Thirty-one percent of 35-64-year-olds and 33% of people 65+ say it is very important that their fashion choices are environmentally sustainable.

While the youngest generation shops fast-fashion brands the most, they ranked the lowest percentage of those who say sustainability is not important at all (8%). Thirty-five percent of those aged 18-35 say environmental sustainability is very important when purchasing shoes, clothing and accessories.

When buying clothing, 36% of 18-34-year-olds, 43% of 35-64-year-olds and 47% of people 65+ say they normal-

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ly shop in person. Thirty-nine percent of 18-34-year-olds and 32% of 35-64-year-olds prefer to shop online. Over half of people aged 35+ shop at department stores and 45% of 18-34-year-olds prefer outlet stores.

For shopping inspiration, 25% of consumers rely on their friends and 21% are influenced by their family. Thirty percent of Gen Z say they rely on social media and 25% make monthly clothing and apparel purchases based on social media advertisements or influencers.

There are alternatives for shopping more sustainably. Clothing rentals are not a new concept but they have not taken off as quickly as expected. Five percent of consumers have rented clothing but have typically done it for special occasions including weddings (50%), school dances (23%), business or work events (22%) and vacations (17%) rather than for everyday use.

A more common alternative is secondhand shopping. Thirty-seven percent of men and 55% of women shop secondhand and it is the most common among the younger generations and households that make less than \$50,000 per year. Ten percent of people who shop at thrift stores say they change styles frequently, 17% do it for the environmental impact, 38% say they enjoy finding one-of-a-kind pieces and 65% shop secondhand for the prices.

This survey was conducted by Momentive with 3,105 U.S. adults from December 1-6, 2022.



... health care research

Health coverage vs. basic necessities

Is quality and affordable care out of reach?

As prices for goods and services have increased, many Americans are putting health care on the back burner.

According to research conducted by medical research nonprofit West Health and analytics firm Gallup, one in six respondents say they have cut back on needed care to afford other essentials like rent and food.

Seventy-three percent of individuals earning over \$180,000, 78% of people in the \$120,000-\$180,000 range, 78% of people earning \$90,000-\$120,000 and 75% of those earning \$48,000-\$90,000 say the health care system is poor or failing. Only 5% of people making less than \$24,000 and 8% of people in the \$24,000-\$48,000 range say the system is excellent or good.

Around four in 10 Americans say they cannot afford quality health care. As a result, within the last three months 26% have avoided seeking treatment and 13% were unable to pay for the medication they needed. One in five Americans with chronic conditions cut back on care to afford other household expenses and 20% say their health worsened due to being unable to afford treatment. Twenty-six percent of respondents who are 50-64 years old and 15% of those 65 and older say if they needed immediate quality health care they would not be able to afford it. Thirty-one percent of 50-64-year-olds show concern over affording required prescription drugs and 39% worry about paying for needed health care services in the next 12 months.

Thirty-five percent of adults fret about paying for needed health care in the future and 55% of women and 45% of men are not confident they will be able to afford health care as they age. Americans under the age of 65 fear that Medicare will no longer be available when they become eligible and 75% are anxious of the availability of Social Security.

The U.S. health care system has faced fluctuating opinions regarding health care affordability. When asked what grade they would give the health care system, nearly half of the American public surveyed say it is doing poorly or failing. An extremely low percentage of Americans believe the U.S. health care system is doing well with 9% saying it is accessible and 1% giving it an A in affordability. While few are happy with the system, the majority say it is satisfactory or doing poorly. In terms of quality, 12% grade it an A, 35%

score it a B, 36% give it a C, 12% grade it a D and 5% say it fails.

The West Health-Gallup 2022 Healthcare in America Report surveyed 5,584 adults from all 50 U.S. states from June 21-30, 2022.



... financial services research

More protection, less-tedious ID checks

Customers prioritize yet dislike fraud prevention measures

Banking benefits are crucial factors when opening a new financial account but fraud control and security is the make-it-or-break-it feature. According to credit-scoring firm FICO, 74% of customers say fraud protection is part of the top three factors considered when opening a new account.

Thirty-two percent of customers ranked good fraud protection as the most important attribute and 28% say it is the second most important feature when considering establishing an account at a new financial institution. Thirty-four percent say ease of use is their No. 1 consideration while 14% say it is the second-most important aspect. Five percent believe the ethical use of customer data is most important and 15% rank good value for the money as their top need. Only 6% say the most important attribute is customer service with 12% ranking it as No. 2 and 17% ranking it as No. 3.

Customer preferences have drastically shifted in other banking areas as well. Forty-nine percent say they are more likely to digitally open a new

account now compared to 2021. Eighty percent say they would open a savings account digitally, 60% would open a personal bank account and 55% would open a credit card. When borrowing money for a mortgage (56%), an auto loan (52%) or a personal loan (47%) most still prefer to go to an in-person branch or conduct business by phone.

Most consumers believe going to a branch is more informative (68%) and secure (69%) while conducting banking matters on an app is easy (59%) and quick (62%). Using the web or a banking app for finances is often more convenient but many still question the security measures in place for credit or debit card payments. Forty percent strongly prefer a fingerprint scan, a face scan (36%), an iris scan (29%) or an SMS passcode (26%) as a form of authentication. Forty-two percent like a username and password option and 40% like an e-mail verification.

While most respondents agree that protection measures are important, many abandon the application process due to extensive identity checks. Forty percent say they have stopped filling out a personal bank account application, a credit card application (38%), a personal loan (37%), a pay-later loan (38%) and an insurance policy (37%) due to complex identity checks. Once customers open bank accounts, many reduce their use if they have complicated identification checks. Thirty percent of credit card users, 24% of savings account holders and 28% of people with personal bank accounts have limited their use to avoid the identity verification process.

Customers understand why these processes are in place as 70% say the measures are set to protect users from fraud, 40% believe they prevent money laundering and 65% say they protect financial institutions from fraud.

The Consumer Survey 2022 was conducted by FICO with over 14,000 customers from 14 countries.



... financial services research

Falling behind

The struggle to reach retirement goals

Regardless of whether individuals contribute more, less or the same amounts to their retirement accounts, the majority are fighting to stay on track. According to Bankrate, three in five Americans contributed the same amounts or more in 2022 than 2021 yet they are not progressing as expected.

Thirty-five percent of Americans say they are significantly behind on their retirement savings goal, 20% feel somewhat behind, 20% are on track, 15% are ahead of their goals and 10% are unsure of where they stand.

Fifty-four percent point to inflation as the No. 1 reason they are no longer saving as much as before. Twenty-four percent say they have a reduced or stagnant income, 23% cite debt repayments and 18% blame market volatility. Thirty-six percent of Gen Z and 31% of Millennials say they have new expenses to worry about and 7% of respondents indicate that they do not want or need to save for retirement.

When comparing generations, Baby Boomers feel the most behind on their retirement savings. Seventy-one percent say they are lagging while only 7% are on track to meet their goal. Nine percent of Gen X say they are on track while 65% say they are not. The younger generations are more confident in meeting their retirement savings goal with 19% of Millennials saying they are ahead. Gen Z has the most balanced

percentages with 30% saying they are behind on retirement and 31% saying they are on top of it.

Younger generations' confidence about meeting their retirement goals may be due to increased retirement contributions. Thirty percent of Gen Z increased their retirement contribution amounts while only 10% lowered them. Thirty percent of Millennials also increased their contributions and 18% decreased them. Nineteen percent of Gen X and 22% of Baby Boomers raised their amount while 17% of Gen X and 18% of Baby Boomers reduced them.

While most individuals are adjusting their contribution amounts, highly educated Americans are raising them. Twenty percent of people with only a high school diploma contributed more last year than they did in 2021, while 15% contributed less. Thirteen percent of individuals with a four-year degree lowered and 33% boosted their amounts. Out of those with postgraduate degrees, 36% increased and 14% decreased their contributions. Having a more advanced education level is often correlated to being more financially secure however individuals who are considered high earners are not contributing enough to meet their goals.

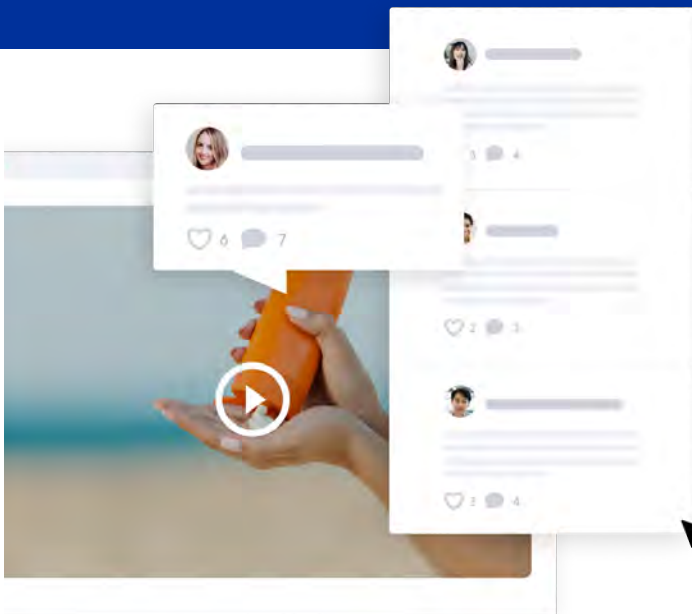
Forty-six percent of individuals earning \$100,000 or more per year say they are not on track while only 23% say they are. Out of those in the \$80,000-\$90,000 range, only 17% feel good where they stand while 54% say they are not doing as well as they should. Out of those earning \$80,000 or less, 59% say they are lagging and 13% say they are doing better than expected.

This survey was conducted by YouGov on behalf of Bankrate with 2,312 U.S. adults from September 21-23, 2022.

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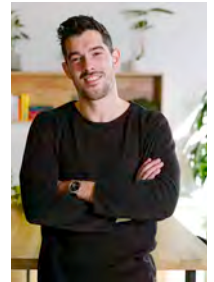
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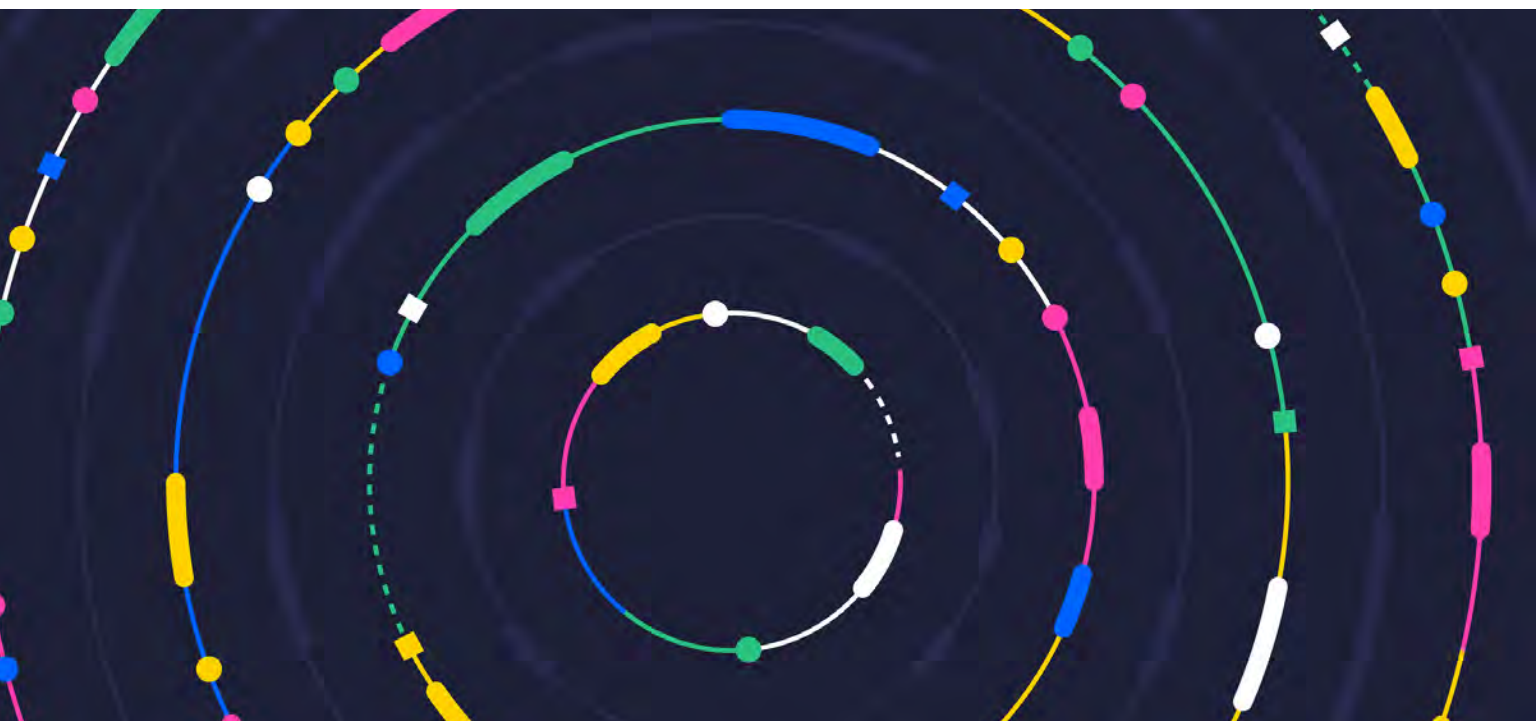
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Aryn O'Donnell, Vice President of Fieldwork

As an industry, insights deserves a respected place at the table at any brand or inside any organization. But coming to that table with confidence requires total belief in the quality of the insights being shared. Face-to-face research delivers on that issue of trust. When you talk with a human, face to face, see their body language and understand the nuances of that personal interaction, you can deliver high fidelity findings.

Priscilla McKinney, CEO of Little Bird Marketing

Moderators are thrilled; End Users are thrilled; Respondents are thrilled – the excitement of doing in person research is all the rave right now. To hear our clients comment how much more insightful their research results have been has been so rewarding. Body language and group discussion delivers those deep insights that they have all been craving the past few years. Market Research is so important for all companies and each method has its own purpose based on each projects objectives. In-person is a vital part of those methods and has proven it will never be replaced.

Angela Lorinchak, President of Jackson Adept Research

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In-person remains an essential tool in any expert researcher's insights toolbox. There is no substitute for being with a consumer face-to-face and seeing and hearing the nuances and subtleties that you just can't get any other way. The richness from these interactions makes them in demand with successful brand marketers who want to truly understand consumers and how they see the world around them.

Jude Olinger, CEO of The Olinger Group

While online qualitative can work well for some shopper research issues – when you start exploring sustainability, structure, materials, or you just need a large shelf context, nothing is better than in-person qualitative!

Cliff Kane, Sr. VP of Behaviorally



Less like Spock, more like Darwin

| By Rajan Sambandam



snapshot

The value
of being
certain about
uncertainty.

The subtitle of Julia Galef’s recent book, “The Scout Mindset,” is “Why Some People See Things Clearly and Others Don’t.” It is based on the idea that there is a lot of uncertainty in the world and it is impossible to account for everything. So, changing our minds based on new information is a virtue that allows us to constantly update our maps of reality – the scout mind-set.

This is in contrast to the soldier mind-set, which is more rigid and unwilling to change and falls prey to various biases such as motivated reasoning that allow one to rest comfortably inside a perception that could diverge significantly from reality.

This view is very appealing as it reflects a perspective that I used when I taught market research to MBA students. The purpose of research is not to obtain perfect information – that’s impossible. The purpose is to go from a state of higher uncertainty to one of lower uncertainty. Of course, we do this by systematically gathering data, analyzing it for insights and providing results to help business decision-makers.

Where do Mr. Spock of TV’s “Star Trek” and famed naturalist Charles Darwin, referenced in my article’s title, fit in? In the way we gather and use information to come to the right conclusion. Before we get to them, let’s first look at what we mean by uncertainty.

Two kinds of uncertainty

Galef talks about two kinds of uncertainty – uncertainty in you and uncertainty in the

world. Though they are conflated in practice, it is the former that is problematic. For example, she cites studies that show that patients are unhappy with doctors who seem uncertain – making them wonder if a better doctor should be consulted. But when doctors clearly explain the complexity of the case and provide context for their uncertainty, the patients are much happier.

In market research we are, of course, plagued by uncertainty, while at the same time, business decision-makers clamor for certainty. Saying “I don’t know” may be taken as an inadequate response because the decision-maker may question the competence of the researcher. This could lead to less-desirable options such as trusting the decision maker’s gut – or some other source that feigns certainty.

The better option is to show that uncertainty is justified, i.e., it is “in the world” not “in us.”

The simplest example, of course, is margin of error in surveys. Results come shrouded in uncertainty and that rarely has to do with the competence of the researcher (though it can). Providing context and explaining why the numbers may be closer to directional than precise can show that uncertainty should be respected not wished away.

This is true even when using more advanced methods like conjoint analysis. Their sophistication can help temper uncertainty but does not eliminate it. And their complexity can make them seem artificially precise, lulling an executive into thinking uncertainty has been squeezed out of the results.

Not so.

By providing the context for how the data were collected, and explicitly acknowledging uncertainty, we can convey the caution needed in interpreting the results.

With that in mind, let's move on to Spock and Darwin.

The Spock problem

Galef watched and noted every prediction Spock ever made and evaluated their accuracy. It turns out that Spock is really quite bad at predicting things. For example, when he thinks something is impossible, it happens 83% of the time, while something that he thinks is more than 99.5% likely happens just 17% of the time.

If Spock had been from the planet Bayesia rather than Vulcan, perhaps he wouldn't be so bad at making predictions. Rather than blithely believing in the strength of his logical thinking, he may have correlated his predictions with actual outcomes and, over time, improved his ability to make predictions.

This should have particular resonance for market researchers. While Bayesian updating is the analytic foundation of conjoint estimation, we don't always apply that to thinking about research problems in general.

Going back to the beginning, if our purpose is to move from a point of greater to lesser uncertainty, it is unlikely to happen in one shot (or one study). It is more often an incremental process that includes triangulated information from varied sources, in order to reduce uncertainty over time.

A handy tool in this process is thinking in bets. "If I were to bet money on an outcome, what would I say?" is qualitatively different from simply summarizing the results from a study. Such a process can be helpful in calibrating our confidence level and providing more realistic predictions.

Spock's problem is not just unwarranted confidence in his thinking but also an inability to learn

from one situation to the next.

Darwin, though, is quite different.

Darwin's process

No, it's not about the theory of evolution, natural selection or survival of the fittest. It's about Darwin's process for getting to those paradigm-shifting ideas. Darwin followed what he called a "golden rule" to combat motivated reasoning:


"... whenever a published fact, a new observation or thought came across me, which was opposed to my general results, (I would) make a memorandum of it without fail and at once; for I had found by experience that such facts and thoughts were far more apt to escape from the memory than favorable ones."

Compare this to (the admittedly fictitious) Spock's reaction to events. Unlike Spock, Darwin is essentially following a Bayesian updating process, going the extra mile to ensure that unfavorable outcomes don't get underweighted, by specifically noting them down. And, as Galef observes, in the long run this proved tremendously useful as seeming anomalies (such as the gaudy tails of peacocks) actually ended up making his theory stronger.

Open to changing their minds

As researchers, we are privileged to constantly work with data and help executives make decisions. The right way to do that is by having a scout mind-set. Scouts understand that their map of reality is inaccurate (often wildly so) and strive to make it incrementally more accurate. Their beliefs are never threatened as they are always open to changing their minds in response to new information. They don't minimize information that's counter to their perspective and are willing to make proportionate changes.

It's a process that takes time, effort, appropriately calibrated confidence and constant incremental updating. In other words, it's the process of doing research well and conveying results to decision-makers.

Research strong and prosper. 

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THIS CHANGES EVERYTHING —RIGHT?



ChatGPT

and its impact on
marketing research

BY DAVID BOYLE AND RICHARD BOWMAN

Most market research professionals are constantly looking for new tools and technologies. At the same time, we are a skeptical bunch, who often prefer to spend more time on the failings of new technology than on its benefits. So we're not going to lie: It was with some trepidation that we decided to write a book about how important ChatGPT is for our field ("Prompt: A Practical Guide To Brand Growth Using ChatGPT").

Yet here we are.

ChatGPT is a free tool that combines the power of natural language processing with machine learning to generate hypotheses, insights and great writing at scale. Imagine having a super-smart robot researcher at your disposal, ready to analyze data, find patterns and come up with hypotheses and suggestions in a fraction of the time it would take a human. This is the future. And it's here now.

Our experience, as long-time market researchers who have immersed ourselves in the artificial intelligence (AI) tool, is that ChatGPT is a game-changer.

As we went over the steps we typically take to help brands understand and set strategies based on their audiences and worked out how ChatGPT could help at every stage of the process, our minds were blown by its power.

Some examples where we have successfully used ChatGPT in market research in the recent days include:

- **Coming up with a list of category-related needs at the pitch stage with a client.** Usually, we'd not get to this until a couple of weeks into the project. This allowed a much richer conversation about how the project would go than would otherwise have been possible at that point.
- **Analyzing customer feedback for a large entertainment brand.** We don't usually do this kind of work but we were able to pull out themes and write a helpful report into the big opportunities more quickly and more comprehensively than we otherwise would have done.
- **Generating great ideas for integrating intellectual property (IP) from a famous TV show into a client's product.** We helped get to a comprehensive list of opportunities that met their audience needs much more quickly and with way less research into the IP, freeing up the experts to refine and enhance our ideas rather than having to do the basics.

CHALLENGES AND PITFALLS

In this article, we will explore how ChatGPT is changing the field of market research. We will discuss its capabilities and how it could impact the market research skill set. Additionally, we will cover the challenges and pitfalls to watch out for when using ChatGPT and how to balance AI with human expertise and creativity. By the end of this article, you will have a clear understanding of how ChatGPT can benefit your work as a market researcher and how it has the potential to revolutionize the field.

One of the most significant benefits of using ChatGPT in market research is its ability to streamline existing processes, saving market researchers a massive amount of time and effort. Say goodbye to slow and brain-draining hypothesis-generation; to laborious desk research to understand a new industry; to thinking through what a brand should do to engage a target audience. Say hello to efficiency!

Imagine being able to explore new categories, identify audience needs and hypothesize about audience behaviors with just a few clicks. ChatGPT can also help you gain a deeper understanding of customer feedback and social media conversations, which can be easily loaded on a project-by-project basis. It's like having a

super-smart research assistant working tirelessly in the background to help you find insights and patterns, in every industry you can imagine, so it can help you overcome the limitations of human memory and bias. Almost instantly. For free.

But that's not all. ChatGPT can also help you with something that most of us dread: analyzing customer feedback. You can now bid adieu to hours of going through pages and pages of customer responses and commentary!

SAVE DAYS OF HARD WORK

One of the most exciting ways to use ChatGPT in market research is for idea- and hypothesis-generation. This is particularly useful in the early

After using the AI tool, the authors are excited by its potential but aware that human input and guidance are still crucial.

stages of market research, when trying to identify potential audience needs, frustrations and opportunities. With the right guidance, you can save several days of hard work and produce results that are more comprehensive, of higher quality and communicated more effectively than you would have been able to achieve alone.

Think of ChatGPT as your new best idea-generating buddy. Hypotheses that would usually take days or weeks to develop can be on your desk when the idea of a project first crosses your mind. For those at research agencies, it can help you come up with a list of category-related needs at the pitch stage with a client, it can analyze customer feedback and pull out themes that you wouldn't have thought of and it can even help a client come up with great ideas for targeting segments. It's a vir-

tual brainstorming partner that never runs out of ideas and can come up with new and fresh perspectives.

Getting started with ChatGPT

Once you have a better understanding of ChatGPT and its potential uses in market research, it's time to take action and start incorporating it into your work. Here are some steps you can take to make the most of this tool:

EXPERIMENT Use ChatGPT to test different prompts and analyze the output to see how it can generate hypotheses, insights and suggestions.

IDENTIFY SPECIFIC USE CASES Find the tasks that ChatGPT excels at, such as analyzing large volumes of data or generating ideas and content at scale, and focus on mastering them.

MAINTAIN A HUMAN TOUCH Remember to balance the use of ChatGPT with human input. Use the insights it generates as a starting point for further exploration and analysis rather than accepting them as the final answer.

USE IN CONJUNCTION WITH OTHER METHODS Pair ChatGPT with other tools for a comprehensive understanding of your audience and to make informed decisions.

CONTINUOUSLY LEARN AND ADAPT Keep investigating ChatGPT, its capabilities and limitations and how it can best be used in your work as a market researcher and adapt your strategy accordingly.

AUGMENTING AND CHANGING

We don't see ChatGPT as replacing human skills. Rather, in our experience, it's about augmenting and changing the market research skill set. It can replace some traditional market research tasks, such as manual data analysis, while also enhancing other skills, such as generating hypotheses, insights and suggestions at scale. Allowing us all to add more value to more clients in more sectors.

Imagine not having to spend hours analyzing data. Instead, ChatGPT can do that for you in a fraction of the time. This allows you to focus on more important tasks such as interpreting the findings from the data, creating insights and developing strategies.

This will free you up to do more strategic work. By reducing the need to spend time and brainpower on certain tasks, we've found that we can focus on more strategic and higher-level activities that require creativity, problem-solving and decision-making. The things that humans are great at! Additionally, ChatGPT's ability to generate human-like text can help us to communicate more effectively and efficiently, whether it be in the form of reports, e-mails or customer interactions. This frees up more time for us to spend on developing new ideas, analyzing data or building relationships with clients. We certainly advocate letting the machine do the heavy lifting and letting yourself focus on refining and enhancing the ideas it generates. We now work at a higher level on more topics with less stress than before.

CHALLENGES AND PITFALLS

While ChatGPT is a powerful tool, it's not without its challenges and pitfalls. As with any new technology, it's important to be aware of them but we haven't found them to be any kind of a barrier to use.

One of the biggest challenges is balancing AI with human expertise and creativity. For all that it can do, it's important to remember that it's not a replacement for human expertise and creativity. You'll still need to refine, validate and size the ideas and hypotheses it generates using traditional methods. Use ChatGPT as a tool to augment both human skills and existing market research processes, not replace them. A

good rule to remember is that you'll always need to add to, edit, revise, reword and improve anything that ChatGPT generates. It always needs human strategic guidance and a human touch.

Another challenge is remembering that the accuracy of the results generated by ChatGPT is directly related to the quality of the data used to train it. And there will be biases and omissions in the data used to train it, as there are in ANY data set. By writing the right prompts and by adding your expertise to what ChatGPT comes up with, you can ensure that the work you deliver is relevant, unbiased and accurate.


Lastly, it's essential to have a clear understanding of the limitations of ChatGPT. It's not capable of providing the same level of context or understanding of the cultural or societal implications of the results it generates. It is a tool, not a replacement for our evaluation and judgement and the final answer, recommendation and communication always have to be owned by and led by a human being.

HERE TO STAY

In conclusion, we believe that ChatGPT is changing everything in the field of market research, and it's here to stay. It's a powerful tool but, as with any new technology, it's important to be aware of the challenges and pitfalls.

To make the most of this opportunity, it's important to use ChatGPT in a way that complements human expertise and creativity. Use it to augment your skills, not replace them. Ensure that the data used to train ChatGPT is relevant, unbiased and accurate. And have a clear understanding of the limitations of ChatGPT and use it in conjunction with human understanding and judgement.

Don't be afraid to embrace this. Try it out for yourself. Even if you think we're only 10% right, that's enough for it to revolutionize how you work and take your career to the next level. So, take the leap and let ChatGPT help you become a better market researcher.

The future is here. Jump on board! 

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••• shopper insights

Cultivating growth

Two-year study tracks increasing consumer interest in plant-based foods

| By Kate Good and Catherine Cowan



snapshot

Industry association research aims to understand grocery shopper motivations across plant-based and animal-based food categories.

The plant-based foods industry has experienced exponential growth in the past five years as consumers find more and more innovative options on grocery store shelves. The Plant Based Foods Association (PBFA) has been at the forefront of measuring plant-based food industry performance and working to better inform plant-based food companies, retailers and the broader food industry about key trends to further advance this burgeoning industry's growth. While retail sales of plant-based foods are well documented, Julie Emmett, PBFA's vice president of marketplace development, recognized a gap in research into the plant-based food shopper – more specifically, data that not only looked at spending habits across plant-based categories over time but also captured consumer sentiment and purchase intent to better understand the “why” and predict future trends.

Through strategic partnerships with top retailers, Emmett works to develop research that helps industry players understand the consumers driving the growth. This valuable information allows retailers to be at the cutting edge of merchandising strategies that make it easier for plant-based shoppers to find the products they're looking for and explore the ever-expanding variety and assortment of offerings that align with their personal values and lifestyle choices. In order to effectively implement strategies that meet consumer needs, core questions around how plant-based shoppers behave in the store and whether shoppers that engage with plant-based segments are actively displacing their animal-based purchasing need to be answered.

To provide the industry with insights into these questions, Emmett engaged 84.51°, the retail data, analytics and insights arm of grocery giant Kroger, to develop first-of-its-kind research that could serve as the foundation for consumer insights. PBFA and Kroger have a long history of collaboration and have produced industry-leading research on plant-based meat merchandising strategies that have influenced retailers across the U.S. The



goal of this new research was to understand plant-based category engagement among Kroger shoppers. This includes the history of purchasing plant-based foods and shifts between plant-based and animal-based foods in order to identify where customers are migrating their spend. Understanding the interaction within plant-based categories and capturing shopper progression was also a crucial part of this research as it could provide invaluable insights to inform the plant-based foods industry as a whole.

The research, conducted via PBFA's sister non-profit organization, the Plant Based Foods Institute (PBFI), was aimed at understanding how shopper behavior may be shifting between plant-based and animal-based foods. It aimed to uncover consumer attitudes and sentiment, leveraging 84.51° data science and insights experience.

Part 1: migration analysis

Methodology

The comprehensive migration analysis tracked purchase behavior of nearly 8 million households over two years – Year 1 (2019 to 2020) and Year 2 (2020 to 2021) – across five plant-based categories and five animal-based categories: milk; fresh and refrigerated meat; frozen meals; cheese; yogurt.

The 8 million households were categorized into five segments,

ranging from shoppers new to the plant-based category to shoppers leaving the category (Figure 1). These segments are: New, Increaser, Maintainer, Decreaser and Leaver. Each household was classified from each target group into a migration segment by comparing spend in the post-period to the spend in the pre-period.

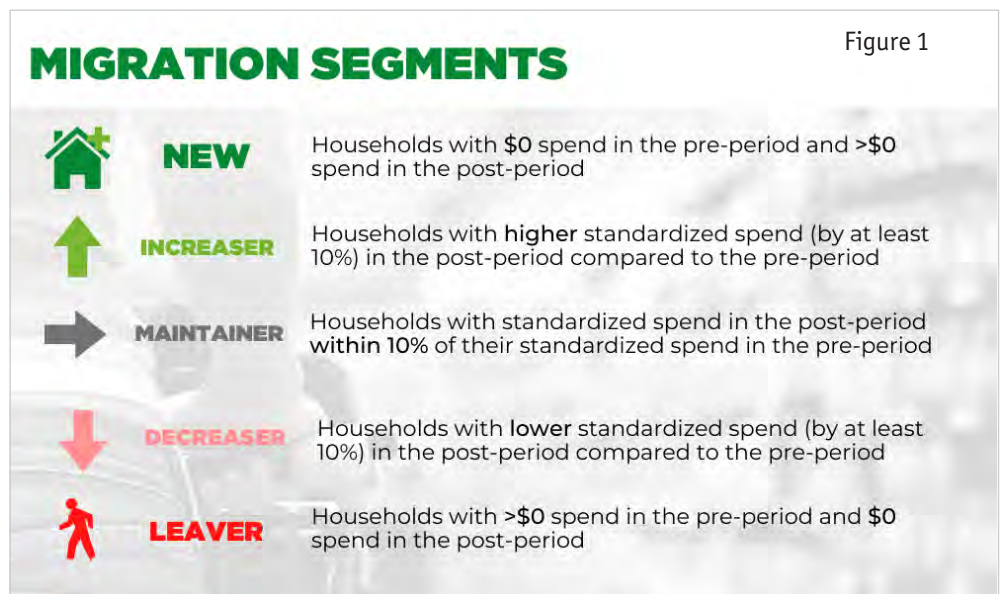
The questions at the center of the migration analysis included:

- To what degree are plant-based shoppers shifting their spend across animal-based products and plant-based products?
- Are there certain product groups that have large proportions of new engagers?
- How many new shoppers are there in plant-based foods?
- Are certain category buyers contributing to leakage?

Findings

Year 1: In 2020, new households entered key plant-based categories.

During Year 1, the influence of COVID “pantry loading” was evident in consumer buying patterns. Households that were increasing or decreasing their spend in plant-based categories also increased their spend in animal-based categories.



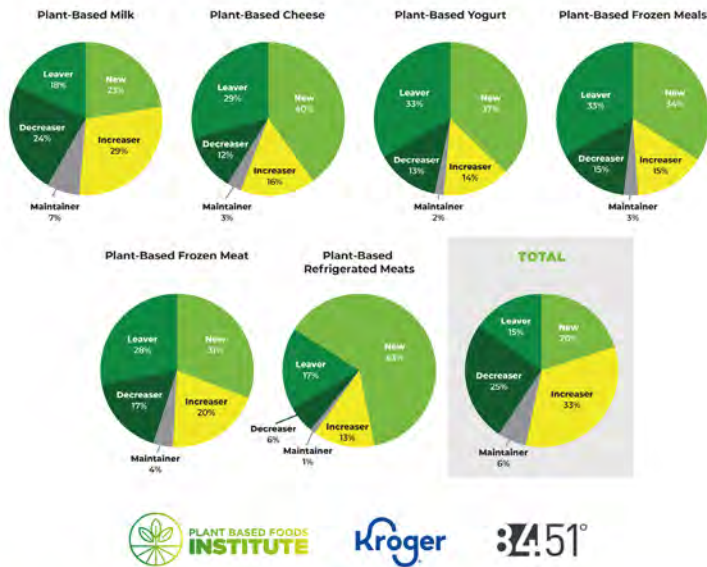
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ALL PLANT-BASED CATEGORIES EXPERIENCED AN INFLUX OF NEW HOUSEHOLDS IN 2020

In addition to the shopper segment dynamics shown here, plant-based food sales increased in 2020, led by refrigerated meat at +205%.



Source: Plant-Based Migration Analysis, 84.51° Insights, Kroger Shopper Data, 2020.

Figure 2

Shifts in dollar spend

- For plant-based households, animal-based engagement either decreased or remained nearly consistent from 2020-2021.
- The average household that maintained its total plant-based spend decreased its total animal-based spend by \$28.21 on average.
- Among all households, plant-based sales increased 24.1% in 2020, followed by continued growth of 1.5% in 2021.

Part 2: plant-based foods shopper survey

In addition to the migration analysis, PBFi, Kroger and 84.51° conducted consumer research via surveys for households in the plant-based engager segment. The goal of this was to understand shopper attitudes and sentiments among the subsegments of plant-based Increaser and Decreaser households to better anticipate future trends for the plant-based category.

Methodology

The qualitative survey was executed online using the 84.51° consumer research real-time insights. A sample of 150 Kroger shoppers were selected based on known purchase behavior for each of two targets.

- **Increaser segment (or households):** The first target included behaviorally validated Kroger customers who were increasing their plant-based spend by more than 10% compared to the prior year.
- **Decreaser segment (or households):** The second target included behaviorally validated Kroger customers who were decreasing their plant-based spend by more than 10% versus the prior year.

Findings

The primary finding of the survey is that plant-based households are indeed purchasing plant-based foods instead animal-based foods and that 95% of the surveyed plant-based engager segment state that they are increasing or maintaining their plant-based consumption compared to the year prior, showing intent to continue engaging with plant-based foods. Among the group of plant-based Increasers:

- 43% report choosing plant-based milk instead of animal-based milk.
- Nearly 30% are choosing refrigerated plant-based meat and frozen meals instead of animal-based items in the same categories.
- Nearly 20% are choosing plant-based cheese and yogurt instead of animal-based products in the same categories.

In Year 1 (Figure 2), findings revealed new households trying different categories of plant-based foods. Plant-based meat had the largest portion of New households in 2020, with 63% of households classified as New. Plant-based cheese was the second highest with 40% of households classified as New.

Growth in plant-based New and Increaser households from 2019-2020 translated to sales growth across plant-based categories. Most categories witnessed double-digit percent growth, with plant-based refrigerated meat seeing increases of over 200%.

Year 2: In 2021, plant-based momentum grew with a steady flow of new households.

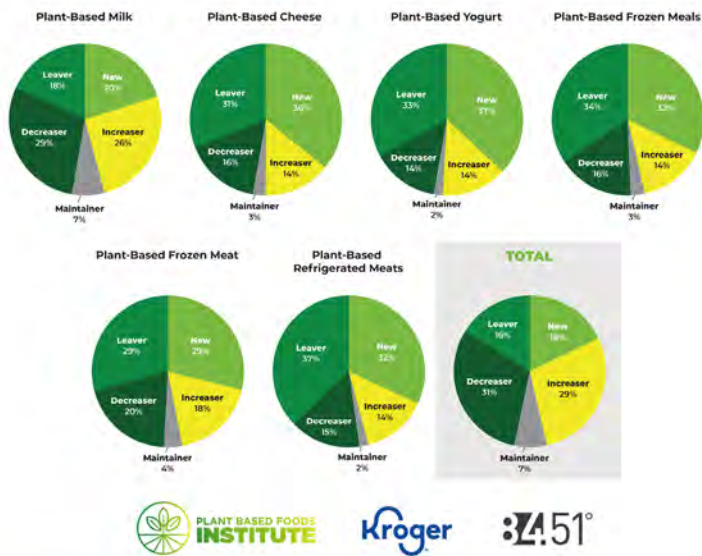
As the COVID purchasing noise began to slow down in 2021, a few key trends in plant-based category engagement emerged (Figure 3). Coming off a year with many new households across each plant-based category, New households continued to grow in 2021 and made up 18% of the migration segment across the total plant-based categories. This progression demonstrates that there is continued interest in plant-based categories building on the COVID bump from the year prior.

Following a year of record sales growth, a slowdown in category sales was expected; however, a majority of plant-based categories continued to grow. Most significantly, plant-based yogurt saw the largest sales increase of the plant-based categories with 13.5% growth; in addition, 37% of households were from the New segment. These numbers suggest there were successful new items and/or innovations in this space that brought new households in and notably, increased sales.

In both 2020 and 2021, Increasers of plant-based cheese spent the most on plant-based foods in total compared to all other product groups by \$66.97 annually, with other categories seeing a change in spend ranging from \$30-60 per year, suggesting that these households are the most loyal and engaged in plant-based overall out of all the target groups. According to 84.51°, once households are engaged with plant-based cheese, it can be assumed that this group will be more loyal to and engaged with plant-based foods overall.

INCREASE IN NEW HOUSEHOLDS CONTINUED ACROSS CATEGORIES IN 2021

In addition to the shopper segment dynamics shown here, plant-based food sales continued to increase in 2021, led by plant-based yogurt at +13.5%.

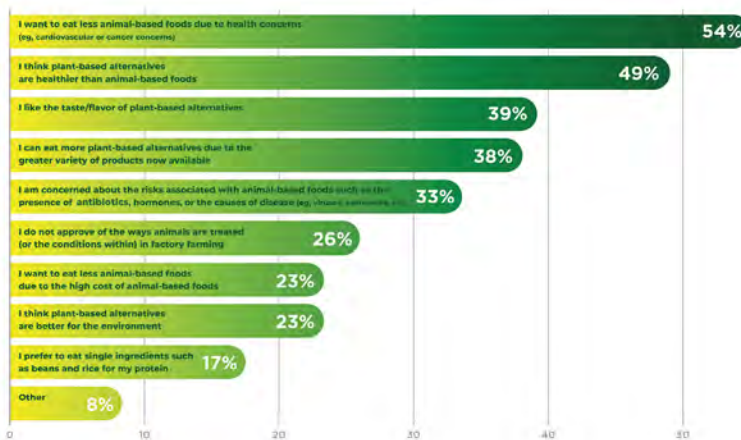


Source: Plant Based Migration Analysis, 84.51° Insights, Kroger Shopper Data, 2021

Figure 3

Surveyed plant-based Increaser households mention health as the leading reason why they are increasing their plant-based consumption (Figure 4), with 54% citing personal health concerns (such as cardiovascular or cancer concerns) and 49% stating they believe plant-based alternatives are healthier than animal-based foods. Note that these sentiments are reflective of surveyed plant-based consumer beliefs/motivations.

REASONS WHY SHOPPERS ARE DECREASING ANIMAL-BASED FOOD CONSUMPTION IN FAVOR OF PLANT-BASED FOODS



Source: Real Time Insights, Custom Survey 5, 84.51° Insights, 2022

Figure 4

- Among plant-based Decreasers who were asked what would make them more likely to consume plant-based, 64% say lower pricing and/or more frequent sales and coupons and 58% say better taste and/or texture.
- For plant-based Increasers, when asked how shopping could be made easier, 61% cited price promotions and 29% said that recipes would be helpful.

While the category is very dynamic overall, the research provided a deeper understanding of shopper buying behavior by quantifying the actual shifts in spend by household for multiple plant-based and animal-based categories. At the same time, we now understand at a granular level what motivates shoppers across these 10 categories. There is no doubt there are shifts between animal and plant-based households and this migration analysis and consumer survey research delivered key insights into the multiple factors driving these shifts and illuminated the nuances of how various product categories behave differently.

Rapidly evolving

Conducting this comprehensive research across multiple categories over an extended period of time illustrates PBFA and Kroger's commitment to understanding shopping patterns through the analysis of both plant-based and animal-based foods. Given the dynamic nature of the industry and how rapidly it is evolving, the question of how best to merchandise plant-based foods becomes more challenging, requiring research to help the entire industry understand best practices and assess strategies for action. This research (access the full report at <https://pbfinstitute.org/migration/>) serves as the benchmark study that will be conducted periodically to evaluate consumer interactions with plant-based foods as a whole and animal-based foods to better understand the shifts between them. ①

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Fast-growing and ready to vote

Why political parties can't overlook Asian Americans

| By Brittany Chiu

snapshot

While AAPI voters have shared interests, they are not a monolith, the author says.

The 2020 election cycle and the 2022 midterm election exit polls proved that there is much untapped potential among the fast-growing Asian American voting bloc. Those who do not pay enough attention to them risk losing out in the future.

According to the U.S. Census, the Asian American population, whether alone or racially combined, grew 38.6% from 2010 to 2020, and now represents approximately 7% of the total population. Thanks also to a 9% increase in voter eligibility since 2018, more than 13.3 million Asian Americans are 18 and older and able to vote.

There has also been notable increase in election participation among Asian American and Pacific Islander (AAPI) voters. Almost half of all AAPI voters who cast a ballot in 2020 did not vote in 2016 and a quarter of them had never voted in an election before.

A huge factor contributing to the voter turnout is AAPI hate. The 2020 American Voter Survey found that half of Asians, with the exception of Vietnamese, strongly believed that there is some societal discrimination against Asian people. Seventy-five percent of them worried about rising hate crimes as a result of racist language used by government officials and others during the pandemic. Fifty-four percent of the Asian respondents leaned Democrat and trusted Democrats to handle issues deemed most important to them at that time – gun control, crime and violence and racial equity – better than Republicans.

As an example, take a look at Georgia. Traditionally a red state, Georgia was tipped blue by Asian communities in 2020, delivering 16 electoral votes to a Democratic president. It was the first time in 30 years that the Peach State had voted for a Democrat and although AAPI voters comprise only about 4% of the state population, the 91% voter turnout increase was consequential, according to political data provider TargetSmart.





Likewise, changing demographics are gradually impacting not only swing states but traditionally red states as well. Further breakdown of Asian ethnicities in the Asian American Voter Survey 2020 showed support for Biden as follows: Asian Indians (65%), Japanese (61%), Korean (57%), Chinese (56%), Filipino (52%), and Vietnamese (48%).

Evaluate by needs, wants, culture

Asians are mainly concentrated in the Western and Northeastern U.S. states, with 56% of the total population living in these five states alone: California, New York, Texas, Hawaii and New Jersey. However, that doesn't mean other pockets of Asian communities aren't important. At first glance, it may seem like Asians are inherently Democratic but when breaking them down by ethnicity and county, Asians are not a monolith. It is pertinent to evaluate them by their needs, wants, locality and culture.

Swing states have been historically different but those essential to the 2020 presidential election were Nevada, Georgia, Michigan, Arizona, Pennsylvania and North Carolina, with Asian Americans constituting a critical mass in the latter three. Other states of significance when it comes to other national elections include Virginia, Texas and Florida. Let's take a closer look.

Virginia's Asian population is about 25% Asian Indian, 15% Korean and 15% Filipino. Asian Indians and Koreans mainly live in the counties of Fairfax and Loudoun, thus turning them into Democratic strongholds in a predominantly Republican-leaning state. Filipinos on the other hand live mainly in the Virginia Beach MSA, especially in the heated 2nd congressional district where they make up an absolute majority of the Asian population and they can skew either party.

Speaking of Filipinos, Nevada is probably the most well-known purple state and more than half of Asians who live there are Filipino. The state

is neither deep blue nor deep red, meaning its voters tend to be more pragmatic than ideological, and there is no better characteristic that best describes Filipinos than pragmatism.

Six percent, or 1.5 million, of Texans are Asians. About a third of that Asian population is Asian Indian and the second largest group is Vietnamese. They are mainly concentrated in Dallas and Houston MSAs. Although the Asian Indian population usually guarantees a solid Democratic win of Dallas, certain counties of Houston and Fort Worth where sizable Vietnamese communities dwell make these areas more purple than blue. In general, the political ideology of Vietnamese people skews more Republican than Democratic in areas outside of California.

Another swing state where Asians can make a difference is Georgia. Its Asian population is comprised mainly of one-third Asian Indians, 15% Vietnamese and 15% Chinese and Korean combined. The increase in Asian population of Georgia's Gwinnett County has flipped from predominantly Republican to Democrat-leaning in the past decade.

Lastly, although the Midwest houses the smallest Asian population of any region in the country, public universities have attracted numerous Asian Indian and Chinese over the years, most of whom are heavily Democrat-leaning. For example, while Indiana's Hamilton County is only 7% Asian and mainly Republican, its large Asian Indian and Chinese are gradually tipping the county Democratic. Likewise, although Delaware County is 9% Asian, it is trending Democratic due to Ohio Wesleyan University and its Asian community.

Most important issue

The economy was the most important issue for a majority of voters for the 2022 mid-term election. Eighty-one percent of likely voters from the final national NBC News November 2022 poll were somewhat dissatisfied with the U.S. economy; 47% wanted Biden to radically change the way he has been leading the country and 70% believed that the country was headed in the wrong direction. Another poll, AP VoteCast, had more than half of likely voters say that the economy/jobs

was the most important issue. Among these AP VoteCast respondents, their support for Republicans was a 2-to-1 margin. A third survey by Northeastern University had more than half of likely voters preferring Republicans to take control of the Senate when it came to these issues regarding the economy and inflation. Democrats on the other hand were deemed better at dealing with the issues of health care, climate change, abortion, gun control and racial equality. Thus, more than 60% of the Northeastern University survey respondents preferred a Democratic-controlled Senate. Since the economy was the top-of-mind issue for most, many experts believed that a red wave would sweep across the nation.

However, as we saw, the midterm red wave never happened. Victories were marginal, with the Republicans controlling the House and the Democrats ruling the Senate. This doesn't mean that votes of color didn't shift; it just didn't shift

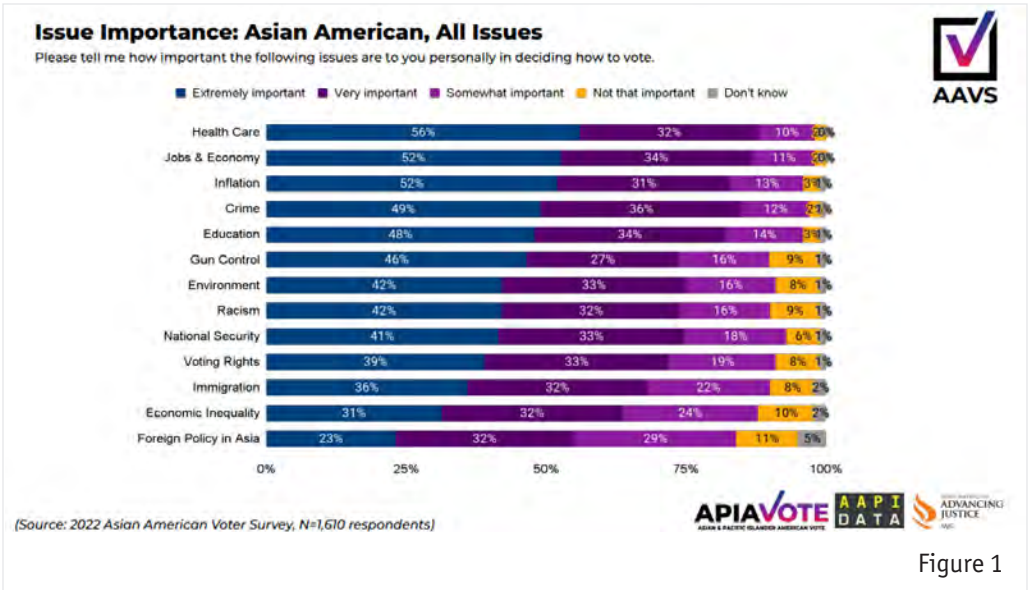


Figure 1

Republican enough. According to most exit polls such as CNN, Democrats won among Black, Hispanic and AAPI voters – mainly due to the younger demographic coming out to vote. However, Black, Hispanic and Asian support for the Republicans jumped 4, 10 and 17 points, respectively. Believing that minority voting blocs will be always more supporting of Democratic candidates is no longer a given. Slowly, more Asians are becoming

independent, if not Republican. Here's why.

Though the majority of Asians tend to be Democrat-leaning, particularly Asian Indians, Chinese, Koreans and Japanese, they are more sensible when it comes to the change they want to happen and the values expressed by candidates. Because the economy and inflation take center stage at many debates and Democrats are deemed less capable

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of doing a good job at these issues, many Asians are divided on party identification and there has been a significant increase in the number of those saying they are independent since the previous election cycle. Both Democrat and Republican party leaders will need to increase their efforts to (re)gain the trust of Asian voters.

In the Asian American Voter Survey 2020, conducted by the organizations APIAVote, AAPI Data and Asian Americans Advancing Justice, 44% identified as Democrat, 31% as Republican, and 23% as independent. The majority of Asian Americans believed that Democrats did a better job in handling social issues such as health care, education, racial equity and immigration. When it comes to jobs and economy, 35% of Asian Americans preferred Republicans while 31% preferred Democrats and 22% believed that neither party produced any differences.

Key issues in order of importance to Asian Americans in the pre-election Asian American Voter Survey 2022 (Figure 1) were health care (56%), jobs and the economy (52%), inflation (52%), crime (49%), education (48%), gun control (46%), environment (42%), racism (42%), national security (41%), voting rights (39%), immigration (36%), economic inequality (31%) and foreign policy in Asia (23%).

Additionally, the number of those who identified as Republican dropped to 19% and those who identified as independent increased to 29% (Figure 2). There was no change among Democrat identifiers compared to 2020.

Specifically, there was slight change in party evaluation when it came to jobs and economy (Figure 3). While Republicans are still preferred over Democrats, only 32% of Asians are confident in them. The support for Democrats remained relatively unchanged, while more Asians (30%) believed that neither party is good at handling this issue. Regarding inflation, most Asians were equally split between which party does a better job. More than 30% of independents believed that neither party made a difference. Interestingly, an overwhelming majority of Vietnamese

(41%) believed that Republicans were better at dealing with inflation than Democrats. When it came to crime, most Asians believed that neither party was equipped to deal with the issue. Koreans, Japanese and Asian Indians were more likely to believe Democrats to be better at reducing crime, while Filipinos and Koreans were more confident in Republicans. Thirty-five percent of Chinese were independent, believing there was no difference in either party. Again, the findings in the Asian American Voter Survey 2022 capture a small but accurate narrative of the red wave that never happened and the close battle between both parties. Increasingly, more Asians, akin to other groups, are unsure of or lack confidence in either Republicans or Democrats being able to handle a majority of issues well.

Not much attention

Despite the increasing importance of the Asian voting bloc, it has not received much attention from either party. According to the 2022 Asian American Voter Survey, 52% of Asian Americans received no contact at all from the Democratic Party and, similarly, 60% of Asian Americans received no contact at all from the Republican Party – clear indications that both parties must boost their AAPI engagement efforts.

To increase Asian voter participation and turnout, campaigns and outreach groups need to do much more to inform Asian Americans about campaigns and the election process – again, keeping in mind that they are not a monolith. Communication needs to be tailored de-

pending on the local Asian population. Word of mouth through community outreach, friends and family is the best way to reach general Asians. However, Vietnamese in particular are highly wary of digital misinformation, so they are less likely than other Asian groups to view online election information sources as credible.

There are also three barriers to high AAPI voter turnout that need to be addressed.

Undoubtedly, the first barrier is **language**. The majority of eligible Asian American voters are naturalized citizens rather than U.S.-born. Fifty-seven percent of foreign-born Asians speak proficient English and a third of them speak only English in their homes. The most commonly spoken Asian languages are Chinese (Mandarin or Cantonese), Hindi, Tagalog, Vietnamese and Korean.

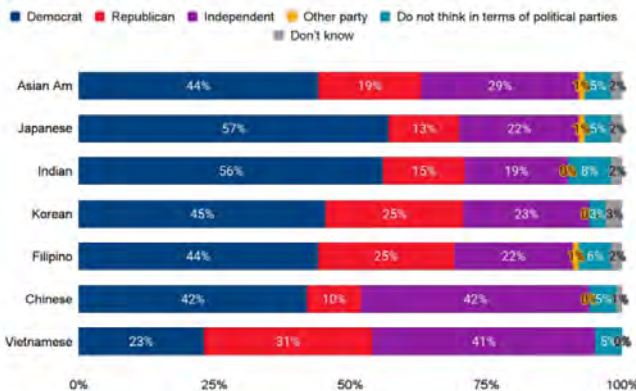
Asian American voters have a high ballot rejection rate. There may not be enough in-language access services on election information gathering and the election process. Although the federal government does mandate states to provide language assistance when voting, not all states and their counties provide every election resource in Asian languages and not all languages are covered by Section 203 of the Voting Rights Act. This has led to past and ongoing voter suppression in several states.

The second barrier is **signature-matching**. Not all immigrants have a signature and even if they do, the signature may be in their native language and illegible to the officer of elections. Name

Figure 2

Party Identification

Generally speaking, do you usually think of yourself as a Democrat, Republican, an independent, or in terms of some other party?

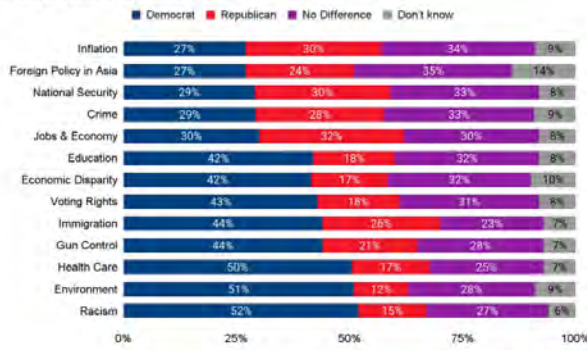


(Source: 2022 Asian American Voter Survey, N=1,610 respondents)



Party Evaluation: Asian American, All Issues

Please tell me whether you think the Democratic Party or the Republican Party is doing a better job with this issue, or if there is no difference.



(Source: 2022 Asian American Voter Survey; N=1,610 respondents)



Figure 3

mismatches because of transliteration are also common.

The third barrier is a lack of **language support for mail voting**. Since many Asians prefer mail voting, immigrants, without the help of their family or friends, may find the process complicated, particularly if there is no language access service, and become less confident about or interested in voting. In addition to a lack of language access services, there is also the fear of misinformation, especially during the 2020 presidential election and the debacle surrounding election fraud. The pre-election Asian American

Voter Survey 2022 found that 51% of Asian Americans reported that they would prefer to cast their ballot by mail or ballot drop-off in the 2022 midterm elections. This may be attributed to the fact that mail voting is the default method for casting a ballot in the Western states where a significant number of Asians live.

Political map-shifters

In summary, Asian Americans are not only the fastest-growing voter bloc but they are also political map-shifters. History has seen record Asian voter turnouts in 2008 and 2020. Counties that tradi-

tionally had been easy to win are not so anymore as diverse Asian communities settle in. While it's easy to think that they are a single, giant entity who is blue-leaning, current trends prove this to be a fallacy. Location, ethnic communities and policies relevant to their communities all play a factor in who they vote for. Asian Americans are increasingly politically active and both parties should pay heed to their voices. ①

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Key takeaways

- Inflation, economy, health care, crime/violence and education were the top key issues for Asian voters in 2022.
- Asian voters remain divided on important key issues. While Democrats are perceived as doing a better job on social issues such as abortion, immigration, etc., Republicans edged them out on most of the main issues in the 2022 election cycle.
- There has been a gradual shift of Asian Americans leaning Republican, despite Democrats having a stronghold on minority voters. When broken down by ethnicity, Asian Indians, Chinese, Koreans and Japanese tend to be Democrat-leaning. Counties with college towns or growing cities/suburbs with significant Asian populations are usually bluer or are turning blue. Vietnamese are the most Republican-leaning, particularly those in Texas. Filipinos can skew either way, depending on where they live.
- For Asian voters, word of mouth is the most important source of information. Family and friends are the most trustworthy sources of information, which is perhaps very different from the general market. Over half of 2022 voters said they had not been contacted by any party regarding election information and government policies. More than 40% of Asians would find it helpful if voting assistance was available in their own language.

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GAME CHANGERS



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Making research a renewable resource

Thoughts on an evolution from insight gathering to
insight farming

| By James Wycherley

snapshot

James Wycherley explores the company-wide value of taking a big-picture view of the insights process.

The evolution from hunter-gathering to farming the land was a critical step for human society. The drive to become insight farmers is just as critical for researchers and analysts who want their department to have a sustainable impact in their organization.

In 2005 I was given the opportunity to lead the first combined insight team at banking and financial services firm Barclays, incorporating market research, market analysis, customer analysis and competitor intelligence. Keen to improve the department's visibility and impact, I worked hard to get onto senior executives' appointment calendars and talk to them about our projects. At that time Barclays was recruiting a lot of new senior managers from the U.S. and after a while I found myself invited to their induction meetings, marched into the room as part of these new executives' introduction to the bank.

But what I discovered was that the more senior the audience, the less they really wanted to know about individual insight projects. They weren't after the findings from particular pieces of analysis or research. What interested them was the big-picture understanding that we had developed off the back of hundreds of different projects. They wanted to know how and why consumers in our markets became customers of our organization and how they then created or destroyed value for it.

The problem for me then, and I think the problem for many insight leaders today, is that while we will have usually an instinctive understanding of part of that big picture, it's a bit hit-and-miss, for two reasons.

First, insight projects tend to be planned bottom-up: We look back on our work each year and see a collection of projects undertaken to support different decisions made by different stakeholders, not one comprehensive piece of work to which the individual pieces of research and analysis have contributed.

Second, the vast majority of our insight specialists' time is spent work-



ing on new investigations, so when senior people ask us to explain the big picture, we often have to think on our feet and there's every chance that our colleagues would come up with a different answer.

If insight teams are responsible for insight as well as insights, we need to transform the way we plan our time, allocate resources and measure success. We need to move away from a world where we spend all our days hunting for new insights and recognize that wise insight teams know that insight farming is more valuable to their organizations and more sustainable for the team itself.

Explain something fundamental

So, do you hunt insights or farm insight? It's worth exploring that farming analogy, because it helps explain something fundamental about the evolution of insight teams and what sets the most effective teams apart.

- Farmers balance the short-term need to make an income with the long-term stewardship of their land.
- Farmers value experience and use it to develop a big-picture view of how all the elements of nature combine to shape their environment.
- Farmers prepare the ground carefully, tilling the soil and sowing their seeds.
- Farmers have the patience to cultivate their crops, investing in irrigation systems that will sustain the land for many years.
- Farmers can then harvest from their fields time and again and they have the satisfaction of knowing that they are feeding the nation, not just hunting to satisfy an immediate need.

What has all this got to do with insight teams? I think that too often insight teams act like hunters: We get drawn into the thrill of the chase as

we pursue new findings; then, having reached our target, we move onto the next one. I'm not saying that we don't need to run new insight investigations but putting all our focus into new projects means that we never have time to reflect on all the things that we already know, make connections we hadn't spotted, investigate contradictions and come up with a comprehensive view of our customers, our markets and our organizations.

Our organization, the Insight Management Academy (IMA), would argue that there is always going to be more value in accumulated knowledge than in a single new project. Therefore, it stands to reason that our companies can make a better return on their insight investment if we devote a significant part of our resources to farming our existing findings and seeing each new project as one more piece of a far bigger jigsaw puzzle.

Paid back many times over

Driven by a desire to realign what the senior executives at Barclays needed and what our insight team was actually working on, I directed a lot of my energy for the next 10 years on rebalancing our focus on new research and analysis with the broader imperative to develop a knowledge asset for our organization. And we discovered that the apparent contradiction between the two activities was often quite superficial and that time invested in managing the collective customer and market knowledge base paid back many times over.

You would be forgiven for thinking that time spent plowing through previous projects rather than quickly moving onto the next one is unlikely to pay back very quickly. But what you find is that developing this big-picture knowledge means that you can both cut out duplication and respond in a far more agile way when someone next asks you a question.

You can also offer decision makers a choice: take a broad understanding based on previous work straight away or spend money and wait several weeks for the results of new research.

And you can produce better insights every day, because if insights are contextualized observations, it's your customer and market knowledge base that provides a lot of the context that we need to interpret the new things we see. It's the knowledge base that provides perspective

5 key takeaways

1. Progressive insight teams recognize their responsibility to produce big-picture insight as well as new insights.
2. This takes a different mind-set, more akin to insight farming than insight hunting.
3. Insight farming takes time and the patience to plow through previous research and cultivate knowledge.
4. Insight teams can really reap the reward as they cut out duplication and produce better, more contextualized insights.
5. Insight farming is ultimately more worthwhile for our colleagues, more sustainable for our insight teams and supports more agile decision-making in our organizations.

and those really big numbers that give us a sense of scale when looking at new numbers.

In my book, “Transforming Insight,” I said that the seventh secret of successful insight teams is that they aspire to be insight farmers, cultivating and harvesting accumulated knowledge. Out of all the topics discussed in over 17 years of our organization’s insight forums, this is perhaps the one I feel the most passionately about. When the IMA’s co-founder, Steve Wills, first raised it as an important aspect of insight management, it immediately resonated with me, and it was at insight forum discussions that I had chance to compare my experience with that of other leaders.

It was from one of those other insight leaders, Caroline van den Bos, who holds a record for having represented four major organizations at the forums, that I first heard reference to hunting and farming, an analogy which we think is very pertinent and has been worth spending a lot more time developing.

Often hidden

Now, it’s very rare to find any progressive head of market research, analysis or insight who doesn’t recognize that all the understanding hidden within previous reports, presentations, dashboards, workshop notes, personal notebooks – and insight specialists’ heads – wouldn’t be worth far more to their organization than doing one further piece of research or analysis. But the problem is that it is often hidden, it’s totally fragmented, unusable in its current form and fre-

quently contradictory if it was based on different sources at different moments in time. I know some insurance companies that have had projects running for years simply trying to define “a customer” and hence how many customers an organization actually had, so try getting everyone in an insight team to agree on anything more sophisticated, like the top five reasons why customers leave your organization and the top 10 interventions that would have biggest return on investment!

Just like real farming, insight farming requires patience, hard work and the ability to change insight professionals’ ways of working and then stick to a plan. Effecting this sort of behavior change in our teams is not easy, which is probably why the IMA’s benchmarking scores reveal that most insight leaders consider their teams to be considerably better at generating new insights than at cultivating and harvesting accumulated insight.

There is always a short-term need that seems more pressing, a stakeholder jumping up and down demanding some analysis that will have a more tangible, immediate benefit. But stitch many of these individual requests together at the end of the year and it often becomes apparent that our insight teams have actually produced very little new big-picture understanding and, further, that they would have been much better off splitting their resources between the obvious short-term need to find out new things and the less obvious but equally important need to build a customer and market knowledge asset that can then

underpin every subsequent piece of work and conversation.

The disconnect between the importance of this big-picture work – and the difficulty in actually making it happen – has never been more apparent than during the lockdowns. At several insight forums IMA members have described the difficulties faced by less-experienced analysts and researchers when they’ve tried to produce new insights while working remotely. It would have been so much easier for them if their first few weeks had included a comprehensive introduction to all the key knowledge held on customer segments, key markets, categories, products, channels and brands and if they had been encouraged to see their new projects as answering an immediate business question and adding to that big-picture view.

Without established processes in place, however, it has been very difficult to start building a dynamic knowledge base without the benefit of conversations across the desk and the group pressure to adopt new ways of working.

But the long-term benefits remain. In fact, in a world where many organizations have had to fundamentally rethink their propositions, customer journeys and business models, it has been even more important to draw on big-picture understanding, to differentiate between short-term changes and long-term, fundamental customer truths.

Act as stewards

So, however busy it is in your insight team, with every researcher and analyst hunting for the next individual insight, please don’t forget that insight farming is ultimately more valuable for our organizations. It’s a more satisfying and worthwhile activity for our colleagues and it’s more sustainable for our insight teams. It helps us to act as stewards of customer and market understanding, developing an asset that can provide our organizations with sustainable competitive advantage. 📌

James Wycherley is CEO of the Insight Management Academy. He can be reached at james.wycherley@insight-management.org. This article is adapted with permission from an episode of the IMA’s “Transforming Insight” podcast.



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••• b2b research

Make it matter

Using audience insights to inform B2B content marketing strategies

| By Yash Gad and Sally Slater



snapshot

C-suiters are focused on business but content aimed at them shouldn't ignore their humanity, the authors argue.

Marketers can agree on a simple truism: To reach your target audience and motivate them to action, you need to understand what makes them tick.

Yet for B2B marketers, that is easier said than done. Today, most organizations get intelligence on B2B buyers in one of two ways: 1) traditional market research in the form of surveys, focus groups or one-on-one interviews; and/or 2) first-party website data.

Traditional market research is a valuable input into marketing strategy but it can be time-consuming, expensive and, ultimately, only representative of a single moment in time. If the business environment changes, the data becomes obsolete.

First-party website data also provides a wealth of insight but with limitations. Tools like Google Analytics can provide insight into overall user behavior but unless a website visitor is already a known user, you can't easily distinguish between traffic from qualified buyers and irrelevant activity.

And what about the online behavior of buyers outside your website? Your site is just one touchpoint of many in the B2B buying journey and is seldom the first stop. Until recently, B2B audience behavior outside the four walls of the company website has been a black box.

Lessons from consumer intelligence

In most aspects of marketing, B2C companies are ahead of their B2B counterparts. The capability to leverage audience data is no exception. Consumer intelligence is now a foundational component of the B2C marketing playbook. Thanks to forerunners like Netflix and Amazon, consumers now expect businesses to deliver a seamless, hyper-personalized customer experience. Meeting that expectation requires a 360-degree view of the customer and behavioral insights that anticipate what consumers will want and need next.



The MarTech boom of the last few years has yielded a plethora of services and software to analyze consumer behavior. Social media analytics has been a particular boon for marketers because of the ease of access to broad audience insights, low cost to collect data and (on aggregate) data points that can mimic some of the rich insights on pain points, language and media consumption habits that come from focus groups and interviews. When B2C marketers combine social listening insights with first-party website data, they get a holistic picture of their customer base that enables them to reach target audiences with the right message on the right channel at the right time.

B2B audiences are different

Every B2B buyer is also a consumer and as the B2B buying journey moves to digital channels, buyers increasingly expect the level of convenience and personalization they experience with B2C companies. However, while consumer intelligence may shed some light on B2B audiences' interests and consumption habits outside of work, that doesn't necessarily translate to how they make purchasing decisions for their business. A B2B buyer likely doesn't need to consult anyone before purchasing a personal laptop (with the possible exception of their significant other) but the vast majority of business purchases are decision by committee: For larger deal sizes, as many as 11 individuals may need to weigh in, according to Gartner research. And while the decision to buy a relatively more expensive discretionary item like a laptop may take a few weeks of research, the B2B sales cycle trends much longer.

B2B-specific audience intelligence aims to understand buyers' business needs, who influences their business decisions and where they go for information when researching business issues and solutions. However, traditional research approaches can fall short for three key reasons:

Volume: There are typically far fewer B2B stakeholders that matter and many of them are difficult or prohibitively expensive to reach in interviews and focus groups.

Channel: While there are some exceptions, most senior decision-makers are not active enough on channels like Twitter – the go-to platform for consumer social listening – to warrant large analytics projects. Those that do more than “lurk” on Twitter or channels like Facebook or Instagram seldom discuss professional or business pain points.

Scale: Many B2B buyers use LinkedIn in that capacity but mining insights at scale has historically not been feasible. LinkedIn is one of only a few social media platforms not to offer API access to retrieve or analyze posts in aggregate.

How then are B2B businesses to get access to the continuous stream of audience intelligence they need to target their buyers with precision? We believe applying B2C analytics approaches to LinkedIn can help us crack the code. While there are other platforms dedicated to business conversations like Glassdoor, Fishbowl and Indeed, post anonymity limits our ability to validate audience identity and relevance. LinkedIn is the holy grail: insights can be paired with detailed information users provide in their profiles about their job titles and where they work.

Because users readily share this firmographic information, we can home in on stakeholders from a particular sector or set of job titles to gauge what's top of mind, what content they are most likely to engage with and, ultimately, the signals of intent that may indicate they may be interested in a particular good or service. Critical to this analysis is looking not only at target buyers' post activity but also at their post engagement activity. Our research shows that what business executives comment on and “like” foreshadows what they'll be talking about next.



Putting theory into practice

Let's imagine we need audience intelligence to inform the marketing strategy of a hypothetical management consulting firm with a health care industry vertical. Our hypothetical company, HealthCo, wants to reallocate its marketing budget toward tactics that are most likely to generate business ROI.

Leveraging the Executive Signals Platform, our proprietary B2B audience intelligence database, we looked at C-suite executives at health care organizations with annual revenues ranging from \$34 million to \$292 billion. Here's what we uncovered – and practical examples of how we could translate the findings into actionable marketing takeaways.

Key insight #1: Appetite for M&A-related content drops dramatically.

Engagement on M&A-related topics saw a massive swing over the course of 2022 across all health care C-suite executives but especially among CEOs. Between the first half and last half of 2022, CEO engagement on posts related to M&A declined by 90% – an early indicator of the record drop in M&A activity in the second half of 2022.

The tone and narrative of M&A-related content also shifted. In early 2022, health care executives' top-engaged content touted how new acquisitions would improve patient solutions or enable clinical advancements in enthusiastic detail. By and large, the fo-

cus was on M&A as a catalyst of health care innovation. Posts celebrated the collaboration between the parent company and the newly acquired entity.

By contrast, top-engaged M&A-related posts in the latter half of the year were written in a dry, matter-of-fact reporting style, often stemming from corporate accounts. Posts generally failed to display the same sense of partnership in messaging. Instead, posts focused on how the acquisition would support and strengthen the internal initiatives of the acquiring company.

The marketing takeaways – for HealthCo or any company in the M&A business:

- When prioritizing spending, HealthCo should consider reallocating some dollars away from its M&A consulting services to higher-demand areas.
- If M&A remains a business priority, content should shift to focus on deal strategies that enhance existing internal capabilities vs. greenfield opportunities.
- Messaging should emphasize operational efficiencies and time-to-value.

Key insight #2: Different roles have different interests.

Though health care CFOs engaged with fewer posts relative to their C-suite peers, they demonstrated the most interest in supply chain-related content, where we saw average engagement increase by 3% between the first and

second half of the year. Top shared links by CFOs around supply chain content centered around speaker events on navigating supply chain disruption and supplier relationship development.

On the other hand, chief people officers (CPOs) demonstrated far more interest in sustainability and ESG, where we saw an 11% increase in post engagement. Top shared links among CPOs focused on business strategies to implement climate change and sustainability initiatives in practice.

Meanwhile, health care CEOs expressed the most interest in content related to leadership, representing 30% of all engagements but decreasing by 43% between 2022 H1 and H2.

The marketing takeaways:

- Messages should be tailored to each buying committee member based on their title, as interests vary.
- HealthCo should consider developing specific lead-nurture campaigns for each title: a supply chain-focused content stream for CFOs; a sustainability-focused content stream for CPOs; and a leadership and workplace-focused content stream for CEOs.
- When speaking to the CPO, messaging should focus on practical measures for integrating ESG practices.
- If HealthCo is already running a supply chain-focused advertising campaign, it may want to narrow its

targeting to focus on finance executives for a higher click-through rate.

- Attending or sponsoring supply chain conferences may be an effective strategy to build relationships with the CFO audience. Notably, two supply chain speaking events referenced included Highmark Health 2022 Diverse Supplier Forum and Super-Return 2022.

Key insight #3: Personal stories resonate.

For health care chief human resource officers (CHROs), top engaging content centered around inspiring messages focused on leadership skills. Top posts included sentimental messages, encouraging leaders to embrace their shortcomings and defy the norm that leaders must be fearless to grow in their careers and lead others successfully.

For CEOs, content on personal experiences such as career path challenges and success stories received high levels of engagement. For example, SCAN Group and Health Plan CEO Sachin H. Jain shared a highly personal post on embracing his Indian identity in a professional setting. The post received

3,072 engagements across all LinkedIn members and eight from other health care CEOs.

The marketing takeaways:


- Content targeting CHROs should feature strong storytelling and tug on the heartstrings.
- Consider creating a leadership Q&A series to garner interest and engagement from CEOs.
- Content targeting CEOs may resonate better with real-life anecdotes and quotes from their CEO peers.

While HealthCo is imaginary, the audience we examined and the insights we extracted are very real. With the right audience dataset and analytics techniques, any B2B organization can tap into insights that improve buyer interactions and increase engagement.

Paint a better portrait

B2B marketing may trail behind B2C but it always follows the same trajectory. In the next three years, we expect access to always-on B2B audience insights to become mainstream, an essential supplement to annual

surveys with more limited shelf lives. The integration of publicly available third-party data with first-party data will paint a better portrait of B2B buyers at the individual level and in aggregate. Better data and insights will fuel a fundamental shift in marketing strategy. We imagine a world where the traditional annual marketing plan is dead, supplanted by more agile planning methods that account for frequent demand and behavioral shifts. We'll see widescale adoption of account-based marketing and vague buyer personas replaced by stakeholder profiles backed by hard data.

The end result? Precision targeting, optimized digital interactions and marketing dollars that go further. 

Yash Gad is the founder and chief data scientist of Ringer Sciences. He can be reached at yash.gad@ringersciences.com. Sally Slater is head of innovation for the Bliss Group. She can be reached at sslater@theblissgrp.com.



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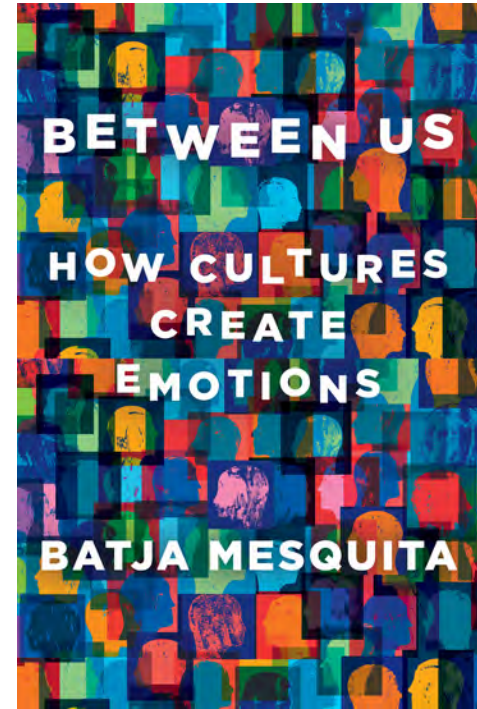


••• the researcher's bookshelf

Varying your viewpoints

Three books illustrate the value of examining the lenses through which you see the world

| By Susan Fader



snapshot

Susan Fader reviews “Between Us,” “Stage (Not Age)” and “Rising Together.”

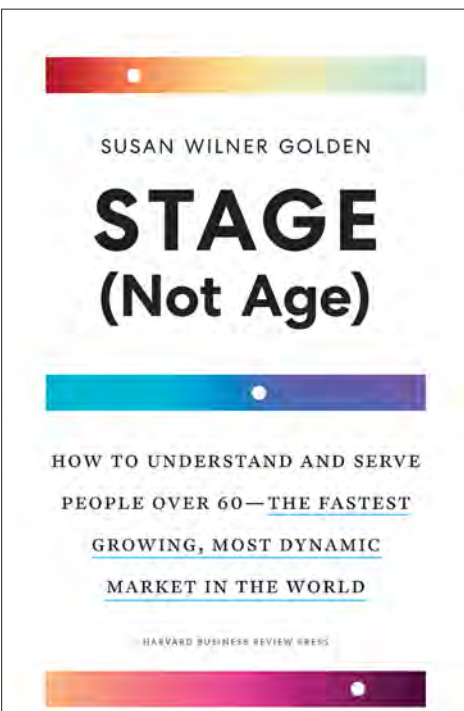
No matter how open-minded we think we are, we all live in self-created bubbles that influence how we interpret what we hear and see and how we interact with others.

Your individual norms and rules, which provide the baseline assumptions underpinning your navigation of the world, may differ just as much from someone who lives in another country or speaks a different language as from someone who grew up down the block from you.

As a business strategy consultant and qualitative researcher, I have found that baseline assumptions are generally seen as givens and are rarely double-checked to verify that they are still an accurate or relevant foundation for what is being explored. But if you begin with the wrong baseline assumptions, it doesn't matter how much data you gather, you may end up going down an incorrect path.

Three new books help us to reexamine the key baseline assumptions that may be integral to our worldviews, with each focusing on a different component of bursting our bubbles: emotions and empathy; aging; and interpersonal skills. While all three have a business focus, with diverse business situational and application examples, they are just as relevant to helping us consider how we act in our personal lives.

“**Between Us: How Cultures Create Emotions**,” by Batja Mesquita, will have you reappraising your skill at reading emotional cues and questioning whether you truly know the right empathetic reaction to exhibit in certain situations. Mesquita is a pioneer of cultural psychology, which is the study of the roles of culture in emotions and society. She was born and raised in Holland in a Sephardic Jewish family and then came to the United States for postdoctoral work and research. She recounts how, even though she is an expert in cultural aspects of emotions, was actively researching the topic and her radar was super-attuned for cultural differences when it came to emotions, in America she was repeatedly misreading and misusing emotional cues. These



missteps negatively impacted how her colleague initially viewed her and how she interpreted work rules.

“Between Us” explores the two different models of emotions she developed – MINE and OURS. These models effectively challenge the belief that emotional cues and societally approved reactions, as well as the role of empathy, are the same across societies or even among people from different cultural backgrounds living in the same city.

The MINE emotional model – Mental, INside the person and Essentialist – is Western (or WEIRD: Western, educated, industrial, rich, democratic) and focuses on how a person personally feels. The OURS model – OUtside the person, Relational and Situational – focuses on what is happening in the relationships with people around us and is more likely to be found in non-WEIRD cultures.

However, even within WEIRD cultures, societal norms and expectations of behavior are different, which can cause the clash that Mesquita encountered with her academic colleagues when she came to the U.S. or, as she relates in the book, that of a Belgian teacher and a student of Turkish background, but born and raised Belgium, who had been incorrectly accused of wrongdoing. The student’s emotional reaction of lowering his eyes to show respect – which follows

the OURS emotional model – is misread by the teacher’s MINE emotional model that says not looking at her directly is an admission of guilt.

The book is full of revelations, including that there are a number of languages that don’t have a specific word for “emotion,” and, in addition, that many emotional concepts that a person from one WEIRD culture may feel are integral to conveying emotion may not exist in other WEIRD languages. Another was that happiness as a motivator for employee happiness in MINE cultures has less relevance in an OURS culture. As Mesquita points out, “Happiness is not universally motivating ... If happiness informs and facilitates action in WEIRD cultures ... individuals in East Asian contexts may not believe that happiness helps their task performance, as white Americans do seem to believe.”

“**Stage (Not Age): How to Understand and Serve People Over 60 – The Fastest Growing, Most Dynamic Market In the World**” lays out a strong argument that businesses are leaving a lot on the table when they think of those 60 and older as one homogenous group of consumers. The book also works as a clarion call for individuals to rethink their view of what their opportunities are as they age.

Author Susan Wilner Golden, director

dcix at the Stanford Distinguished Careers Institute and an adjunct professor, advises startups and companies on the entrepreneurial opportunities that longer lives and the growing longevity economy (\$8.3 trillion in the U.S. and \$22 trillion worldwide) present.

The focus of the book is that we as a society, and as individuals, need to rethink our baseline assumptions and definitions of what an “old person” is and what they are capable of doing and, more importantly, how these individuals want to engage with life.

Golden’s thesis is that the classic three-stage view of modern life – learn, earn, retire – no longer works, especially with record life spans and numbers of people reaching 100 years old. Consequently, the language we use to describe aging has not evolved and many times the descriptors for this demographic create negative imagery that can inhibit a company from successfully tapping into this market.

She also feels that that the attempt to create a linear relationship between age and functionality, e.g., 65-74 is young-old; 75-84 is middle-old; 85+ is old-old, is the wrong approach to thinking about and grouping older people. Any categorization of “old” people must move away from chronological age and move to one that incorporates the person’s overall health plus their mind-set or life stage. As examples of how chronological age can be misleading – and how health and mind-set are more appropriate gauges – she provides a snapshot of three different 75-year-olds: one whose chronic health issues keep her housebound; another who is a creative entrepreneur starting a clothing company; and third who is a daredevil Grand Prix race car driver.

The book is divided into two sections. The first shows that businesses need to move away from thinking about and defining a person by their age and instead shift to considering what stage of life they are in. In the second part, Golden provides multiple cases that dive into market opportunities, the roadblocks that may be encountered and how to overcome them.

Golden also provides in-depth case studies of how an array of businesses, including Warby Parker, Merrill Lynch and Nike, have successfully reframed

how they think about and segment this market and thus have unlocked new and substantial business opportunities. At the end of each chapter, Golden offers helpful recommendations for how businesses (and individuals) should shift their thinking if they want to develop and market products/services for these consumers.

Our final selection is “**Rising Together: How We Can Bridge Divides and Create a More Inclusive Workplace,**” by Sally Helgesen, and at the outset I have to admit that I have bought and given away more than a dozen copies of a previous book she co-authored, “*How Women Rise,*”² and every woman and man I have given it to has said that it was incredibly helpful in guiding them to reframe how they both view and respond to work interactions and their workplace behavior.


Helgesen has done it again with “*Rising Together,*” in which she offers new ways for how companies and employees should approach the diversity, equity and inclusion (DEI) Gordian knot. By focusing on the how, she provides an extremely insightful and concrete pathway that is more effective than most current DEI approaches.

Her DEI thesis is that, “Behavior and actions are the key. This contrasts with the emphasis on mind-sets, assumptions and the search for unconscious bias that has become the dominant means for addressing diversity in organizations in recent years ... it is usually easier to try out new behaviors than to attempt to shift our internal thoughts ... we can’t control the events that trigger us but we can control how we respond.”

The first part of the book identifies the eight common triggers she feels undermine our ability to connect with people whose history and values may be different from ours. Helgesen then outlines how making small behavioral tweaks can help people begin to understand other people’s baseline assumptions and worldviews that are coloring their behavior. She explores how the internal dialogues/stories we tell ourselves may be barriers to our success and the success of others and provides many business scenarios and alternative scripts that can reshape how we self-perceive and behave.

Sharing a commonality with the authors of the two other books reviewed here, Helgesen feels it is very important to explore the taxonomy we use to com-

municate and also recognize that the meanings of words change over time. Her example of whether some newly hired employees were “cheating” or “collaborating” is quite effective.

These three books will definitely help you see and better understand roadmaps to thinking and behavior that might not be mirrors of yours and thus will unlock business opportunities and better interaction with and understanding of others. The more we challenge our own assumptions, the more likely we are to be able to identify and dismantle the barriers that prevent us from communicating effectively. 

Susan Fader is a business strategist and qualitative researcher at FaderFocus. She can be reached at susanfader@faderfocus.com.

REFERENCES

1 For an in-depth discussion of WEIRD, check out “*The WEIRDest People in The World: How the West Became Psychologically Peculiar and Particularly Prosperous,*” by Joseph Henrich.

2 “*How Women Rise: Break the 12 Habits Holding You Back From Your Next Raise, Promotion or Job,*” by Sally Helgesen and Marshall Goldsmith.



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Driven to believe

A look at the three building blocks of trust

| By Dania Rich-Spencer and Stephan Schroeder



snapshot

The authors outline how building trust in technology can help brands forge stronger bonds with consumers.

From basic apps to advanced software and artificial intelligence, most products and services we use today are powered by technology. As brands across all industries increasingly rely on technological capabilities to deliver offerings, trust in technology has never been more critical.

The concept of trust is difficult to unpack. It is highly complex and comprises emotional as well as rational components, making it challenging to assess. It is also abstract and consumers can struggle to articulate how a product or service gains and holds their trust, leaving businesses with limited actionable information.

Yet regardless of its elusive nature, nothing is more essential to an organization's success than trust. It serves as the basis for building relationships between brands and people and impacts how consumers respond to new and existing offerings.

Only one element

While the reputation of a brand is important in building trust with consumers, it is only one element of a larger equation. For brands to secure and maintain long-term, ongoing consumer trust, their products and services must be equally trustworthy – including the underlying technology powering any solution offered to consumers.

For example, a consumer may feel that a long-standing, reputable pharmaceutical brand is generally trustworthy yet still believe that a new product or service carries inherent risks, especially if it is an outlier among other offerings (such as the rapidly developed COVID-19 vaccines and boosters). While trust in a brand may give a new product a head start when it goes to market, trust in the product itself is ultimately key to fostering trial and adoption. This is true whether considering a highly complex, cutting-edge piece of technology (such as nanotechnology or robotics) or more basic products or services – consumers expect that what they purchase will work and that it will work the way that it should.



The result of building trust extends beyond supporting a brand's financial success. It also opens the door to advances that are beneficial for society as a whole. Technology that is designed to make the world better, such as technology that provides access to modern health care, can be effective only when people believe it can be trusted to meet fundamental human needs or improve the quality of life.

So, how can trust be measured and how can it be earned?

At Escalent, we have spent decades studying how people establish and sustain trust in brands and products. As society becomes more and more entrenched in emerging advanced technology and artificial intelligence, we recognize the importance of understanding the relationship between humans and technology.

In 2022, we developed a behavioral science-based framework, called Tech TrustBuilder, that measures trust in technology and its key predictors. Our goal was to develop an instrument that provides diagnostic insights into trust to help companies undertake product and service development and improvement based on target consumer feedback rather than company speculation.

Our researchers found that the foundation of trust in technology is built upon three distinct building blocks: competency, process and intent.

Competency refers to the perceived technology's overall ability to perform reliably and predictably. Process is about the operations of the technology and the user interaction, essentially the "how" of the product or service. Intent, or purpose, deals with the motivation behind the technology's existence and the ultimate goal it was designed to fulfill.

Together, competency, process and intent paint a diagnostic picture of how consumers respond to the technology behind a particular product, service or experience. Understanding where there is opportunity for improvement in any one of these areas provides an avenue for a brand to address possible barriers and build trust in the technological aspects of its offering.

While all three components are crucial, their impact is weighted differently depending upon the brand, offering and industry.

For example, according to our findings on trust in autonomous vehicle (AV) technology, competency influences people the most, followed by process and then intent. When it comes to trusting AV technology, people fall into a low-, medium- or high-trusting group. This is an important finding, as auto manufacturers of fully self-driving vehicles may believe non-car-owners are more trusting of autonomous vehicles due to their lack of vehicle ownership experience. However, this is not necessarily the case, as we found that non-car-owners fall into the medium-trusting group. As such, trust is not a given with these consumers. They too need to feel that AV technology is effective and proven and has people's best interest in mind before they take on the risk of trial or adoption. To build that trust, automakers should consider focusing on competency, such as improving perception of "I believe the technology has the ability to do what I need it to do" and intent, reflected as "I am wary of the technology."

It is critical that companies recognize there is no one-size-fits-all approach to establishing trust and organizations must account for its multidimensional aspects. Building trust is highly specific and highly nuanced and happens on multiple, deeper levels. But, knowing precisely where to focus improvement efforts can help to accelerate the trust-building prerequisite that is foundational to the acceptance, and ultimate adoption, of a new technology or innovation.

Starting point could vary

The starting point for a brand to build trust in technology could vary based on context, including where people are in their experience with and perception of technology in general, the roles technology has played in different societies and how various societies do and do not appreciate technology. Therefore, brands should consider how these things might impact their trust-building strategy.

To illustrate, Escalent recently was tasked with examining the levels of trust people around the world have in water quality enhancement solutions. We found there are certain factors to be aware of and address based on the country for which water quality enhancement offerings are being developed. By understanding the various consumer views toward particular technologies in different societies, we can envision what is required for people to adopt products and services that can make water safer and more accessible for everyone.

Additionally, when framing strategy and messaging to market a new offering, brands need to assess and consider where consumers are in their journey to trust. People's individual and shared experiences as well as personal characteristics, such as location, educational background and socioeconomic status, also can impact how a con-

sumer responds to the technology behind a product or service.

Not necessarily convince them

Brands commonly turn to education to pave the way for adoption of technologically complex services, such as robo-advisors, voice-assistant technology and artificial-intelligence-driven recommendations. However, presenting people with more facts and data will not necessarily convince them to bestow their trust.

Because of its multifaceted nature, establishing trust can require more than presenting numbers and statistics. Facts alone paint only part of the picture or, in some cases, focus on the wrong topic entirely. Instead, brands should address both the logical and more emotional sides of people's brains.

In the case of AVs, automakers frequently default to informing shoppers about the operation and benefits of the vehicle's advanced driver assistance system and how the improvement of these features will lead to fully self-driving capabilities. Despite this, our research shows that trust in AV technology has plateaued and sharing this type of information is effective only for a distinct type of consumer: the early adopter who falls into our high-trusting group, is excited by

innovation and, ultimately, weighs possibility over risk.

By considering the emotions people associate with AVs, brands have a better chance of instilling confidence in self-driving technology.

To illustrate this, we found there are clear, consistent differences between high- and low-trust individuals, especially in their emotional responses, when it comes to autonomous vehicles. Those with a generally high level of trust in technology are more likely to feel safe, brave and intrigued by the prospect of AVs, whereas low-trust groups are much more likely to have visceral, adverse reactions such as worry and suspicion. These different emotional makeups call for vastly different messaging that get to the heart of instilling trust.

Consider all three components

To bridge the gap between skepticism and trust, brands should expand their approach to consider all three components of trust in technology.

Helping people believe in and feel comfortable with the capabilities of technology fueling a product, service or experience calls for a deeper, more informed approach to trust-building. An approach that diagnoses where and why

trust is lacking and points to how to address those deficits ultimately can unlock consumer consideration, enthusiasm and loyalty.

Circling back to our study on trust in water quality solutions as an example, the technology we assessed promoted access to clean, quality water. By understanding why people did or didn't trust existing solutions, we were able to identify what would be required for consumers to adopt new offerings designed to make water safer and more available.

As technology grows more and more central to our business and personal lives, understanding the full range of emotional and rational barriers standing in the way of adopting and placing trust in tech-based products and services will be the key to sustained success. 

Dania Rich-Spencer and Stephan Schroeder are both vice president, automotive and mobility at Escalent. They can be reached at danian.rich-spencer@escalent.co and stephan.schroeder@escalent.co, respectively.



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••• qualitative research

Making sense of it all

Using tech to turn unstructured data into actionable insights

| By Jim Longo



snapshot

Accelerated by the pandemic, high-powered tools are now being applied to process output from qualitative research.

Artificial intelligence (AI) is taking the world by storm as one of the most exciting, and sometimes controversial, technology trends. The latest tool getting all the tech buzz is OpenAI's ChatGPT which employs chatbots to write essays, poems, e-mails, etc., and is one of the fastest growing apps, surpassing one million users within a week of its launch. According to Grandview Research, the global AI market is currently worth \$136.6 billion and is expected to grow to \$1.81 trillion by 2030.

While AI has been around for decades, it has never really lived up to the expectations until more recently. Why is that? The technology industry has evolved thanks to increased data volumes, advanced algorithms and improvements in computing power and storage, making it easier and faster for computers to think and act like humans.

As businesses become more inundated with data from various sources, gleaning insights from this data can be an overwhelming task. AI is helping to solve one of the biggest problems in the market research industry: culling through thousands of interviews and transforming disorganized raw data into powerful intel.

Researchers are beginning to experiment with AI to help turn unstructured data into actionable insights. The desire to draw meaningful insights from business data is not new but the large volume of data being generated every day has made traditional processing methods ineffective. In addition, much of this data is more structured like spreadsheets with rows and columns of data that is easier to analyze. For example, a spreadsheet of point-of-sale data can easily reveal which stores are performing well and which ones are not.



Easier to interpret

In the world of quantitative research, data is interpreted using mathematical algorithms and models. This kind of black-and-white, structured data is easier to interpret and unveil. Although these models may be useful in providing facts and statistical data, they are more limited in their ability to provide insights about subtle trends and nuances.

Qualitative research, on the other hand, involves the collection and analysis of non-numerical, unstructured data such as words, images, videos and observations. It's often used to gain a deeper understanding of people's experiences, opinions and behaviors. However, there are several reasons why it is difficult to scale qualitative research, including:

- Qualitative research often relies on small, carefully selected samples. Researchers may conduct a focus group with a small number of people in order to get a deeper understanding of their experiences. While this approach can be effective, it makes it

difficult to generalize the findings to a larger population.

- Qualitative research can be resource-intensive. It is estimated that over 80% of a research team's time is spent on logistics such as coordinating, editing and analyzing conversations when it should be spent on strategy and decision-making. Researchers may also need to conduct multiple interviews or focus groups or spend long periods of time observing people to gather the data they need. If a researcher conducts 50 video interviews and then needs to sift through each one to summarize the key findings, it could take up to 50 hours. This can make it difficult to gather a large amount of data in a short period of time.
- While numerical data from quantitative research can be easily quantified and compared, qualitative data is more subjective. Different researchers may see the same data in different ways, making it difficult to reach consensus on the meanings and implications of the data. It can also be harder to draw reliable conclusions from qualitative research, especially when the data is collected on a large scale.

At the same time, more non-researchers are getting involved in conducting research in the product and CX space and may see AI as a shortcut to getting faster results. To ensure the findings are truly actionable, it will still require the role of someone trained to question what was not said, as often times this uncovers the true emotions or drivers of behavior.

For too long, product, design, CX and marketing teams have not had the technology to support their desire for a way to scale qualitative feedback – whether moderated or self-captured – from customers. Instead, they have had to navigate a complicated and long-winding path that dramatically limits both the number of customer perspectives that can be collected and analyzed

as well as the specialized expertise needed to perform this research.

Accelerated the need

While the technology for online research and panels has been around for years, the shutdown of travel and in-person meetings during the pandemic accelerated the industry's need to conduct their customer experience research remotely. Many companies relied on piecing together online meeting platforms like Zoom and Teams to conduct their market research. Unfortunately, these cobbled-together solutions were not designed for research and often require more time and resources to implement. Further, they don't have the features and functionality to provide a seamless experience.

However, qualitative research doesn't need to rely on timely, costly and outdated processes. New innovations and approaches to qualitative market research are making it easier for companies to gather feedback and deliver more meaningful and actionable insights to their customers.

The adoption of software-as-a-service (SaaS) and automation is democratizing and accelerating customer research. Today, the availability of online qualitative tools has created a major shift away from traditional market research through automation and streamlining workflows, cutting down on resources and administrative burden. In addition, purpose-built platforms are putting the power of automation into the hands of the research team, enabling them to spend less time on administrative tasks and more time on getting value out of the data.

AI-powered sentiment analysis, text-based analytics and video feedback tools are providing scalable insights into customers' experiences that are transforming relationships between organizations and their customers. When used effectively, AI can be a tool to streamline the analysis on what was said and can save marketers hundreds of hours.

Themes and patterns

Discovering and sharing customer insights is now easier, thanks to a subset of AI called natural language processing (NLP). NLP's automatic translation function quickly analyzes vast amounts of language with accuracy and precision. This eliminates the need to manually transcribe focus group discussions and can also capture verbatims delivered in multiple languages, which can then be processed to find themes and patterns.

Another benefit to using NLP for qualitative research is the ability to process people's feelings and sentiments around key concepts and search terms. This function, called sentiment analysis, scans textual data to determine whether that data is positive, negative, mixed or neutral. Researchers can then boil down people's feedback to underlying emotions and associations with their organization's brand or products.

Qualitative research – for instance, observations and interviews – relies on capturing trends and themes and then assigning them to specific categories. This comes in handy especially when

dealing with limited unstructured data that may otherwise be ignored by the big data algorithms. For example, in a business setting, occurrences can be grouped into internal, controllable factors, such as compensation or conflict management, and external, limited control, such as employees leaving because of poor housing or schools. If a specific occurrence is exhibited by most of the employees, then qualitative research is best suited to illustrate this trend.

By capitalizing on the key benefits of big data of providing general insights about occurrences, the intrinsic benefits of qualitative research and providing specific trends about specific occurrences, businesses can truly be smarter.

These AI techniques enable organizations to reduce market research costs, decrease manual work by shrinking the timeline from asking questions to identifying learnings and connect key data sources from multiple touch points.

In addition, it can not only process qualitative data from current research projects but it can mine past and historical data as well. This means that, if a researcher has not found an answer

to an inquiry within current projects, they can search previous projects to find the needle in the haystack.

Entire life cycle

While technology and AI are transforming qualitative research, companies still need tools to support the entire research life cycle. Turning unstructured data into actionable insights starts with good-quality data and the ability to quickly organize, conduct and analyze qualitative research.

What will be the ChatGPT of the market research world? Only time will tell, but within the next couple of years, the old ways of gathering insights will be shifting and AI is going to play a big role. It could be a real game-changer in not only automating processes but also further summarizing and distilling the bigger takeaways that will impact business decisions. If your company is not adapting to the latest research tools and trends, you risk being left behind. 📌

Jim Longo is co-founder and chief strategy officer at Discuss. He can be reached at jim@discuss.io.

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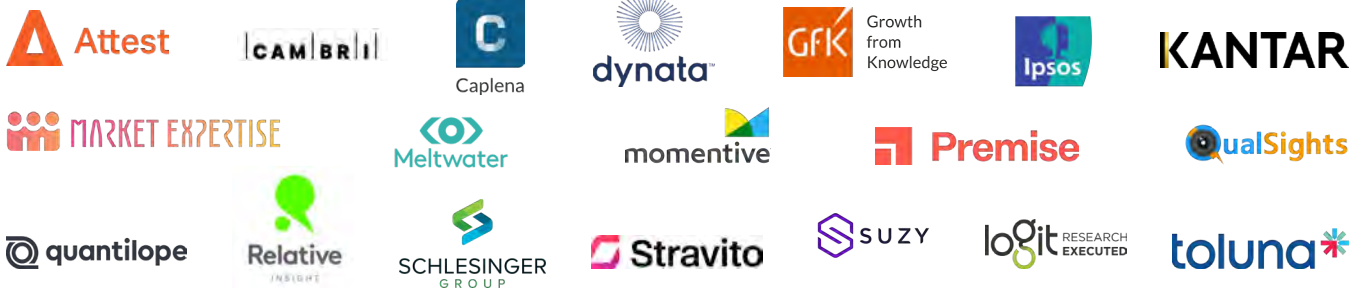
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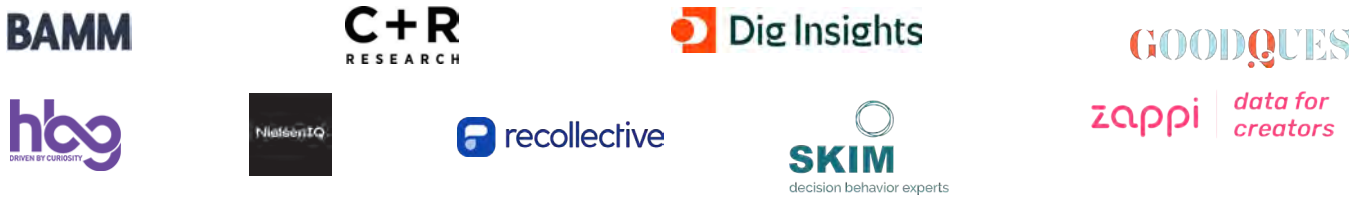
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Key takeaways:

- Factors to consider in setting up a client side team.
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- What not to do, some pitfalls to avoid.

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Just Zoom it: Status, asynchronicity and other scientific reasons you should use videoconferencing 🎮

Vanguard

How stigma is defining the new normal 🎮

WSAudiology



Stigma is a mark or disgrace associated with a particular circumstance,

quality or person. Generally, stigma is discussed in the context of mental health. However, stigma is impacting far more industries. This can range from the tobacco industry to adult entertainment to adult incontinence to hearing aids and perhaps even in online dating.

And there are signs that stigma is not only associated with mature industries, but it can also be built into new and emerging industries as well.

Given this, as insights professionals, who are experts in understanding human empathy and realize the value of storytelling, are we equipped to unpack the impact of stigma across so many industries and brands?

This presentation is intended to spark this conversation via the examples shared, and offer a preliminary framework on how leveraging empathy, with behavioral science can offer a potential pathway for brand growth.

Finally, this presentation will also make a call to action to the market research industry challenging ourselves to question if our capabilities for recruiting consumers, and asking the right questions are truly sufficient in helping us deliver what's truly needed.

Key takeaways:

- Given incidence rates are low for categories that are addressing stigma, how will companies step up in their ability to recruit respondents?
- When will market research companies offer support in developing empathy frameworks to enable brands to learn about stigma, and how to overcome these barriers?
- Are we asking the right questions with the right scales in our quantitative surveys or even asking the right questions qualitatively when speaking to respondents who are dealing with stigma?

CHICAGO

LONDON

NEW YORK

Transforming insights at NPR 🎮

IMA and NPR

How to meet the changing needs of a new generation of customers 🎮

Compeer Financial

So you've gone to the client-side 🎮

Tovala

Picking the right message for maximum impact 🎮

Purdue University

Beyond the data: Influencing with intuition and storytelling 🎮

Tyson Foods

Solving real-world business problems through disciplined, strategic research 🎮

J.P. Morgan

Defeating fraudsters: One client's solution to the survey data quality crisis 🎮

Wilton Brands

Picking the right message for maximum impact 🎮

Purdue University

Beyond the data: Influencing with intuition and storytelling 🗣️

Tyson Foods

Often even more important than quality research and insightful learnings is our ability to take that information and influence people and ultimately, businesses. A successful ability to influence is grounded in strong storytelling and ability to adjust the way in which you tell your story for various audiences.

In this session we'll explore how to ensure you know your audience, considerations for successfully positioning data and insights and how to best pair data and intuition to tell a holistic story.

Client-side versus agency working: Can the grass be green on either side of the fence? 🗣️

SailGP

It's widely acknowledged that agencies are high-tempo, high expectation environments. Agencies tend to focus on billable hours, meaning the need to meet deadlines is real.

Client-side roles are typically steadier and allow you to focus on one business, rather than five or 10 in a single month. But can the grass be green on either side of the fence?

An award-winning market researcher, Jake spent seven years agency-side

before making the switch to join SailGP. His first client-side role.

Jake will share his honest story as a client-side researcher and what actually goes on behind the scenes as a researcher. Often stories Jake and other agency researchers would have loved to understand and find out.

Creating Inmarsat's insights portal 🗣️

Inmarsat

Ross Anderson will discuss how he developed and launched Insights Space – the leading satellite communication provider's new central insights portal. Insights Space is a single place to go for customer insights reports, market intelligence reports, customer dashboards, industry analyst reports, industry news and social media feeds.

Ross' session will include a presentation on the reasons for launching Insights Space, key learnings during the soft launch phase, user feedback and future plans. He will also run a demonstration of the cutting-edge knowledge management portal, powered by Cognni, which is helping to make Inmarsat an even more customer-centric organization.

Inmarsat, the world leader in global mobile satellite communications, created Insights Space – its first central insights portal.

Key takeaways:

- Learn how to make the case for, develop and run a central insights portal.
- How Inmarsat is benefitting from Insights Space.
- See a practical demonstration of a cutting-edge portal.

Solving real-world business problems through disciplined, strategic research 🗣️

J.P. Morgan

Rooting your business in the customer: A grassroots guide to segmentation 🗣️

Tyl by NatWest

Additional sessions from:

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

Diversity, inclusion and belonging in BT's insight team – and beyond 🗣️

BT Group



A look at how BT's insight team is working towards creating an inclusive environment where our insight and our team better reflect the communities it serves.

In this presentation we will discuss:

- A reminder of WHY this subject came into such sharp focus (George Floyd and BLM) – It's important to remember that we have a problem to address; we aren't simply talking about improvement plans.

- What we have done at BT; what's worked well and what obstacles have we faced.
- BT's contribution to changing the way Insight is created and delivered.
- The role of intersectionality – how opening up to thinking about Diversity and Inclusion can't be PROSCRIPTIVE.
- The next step is INCLUSIVITY and BELONGING – moving the subject from sharing experiences to changing our world.

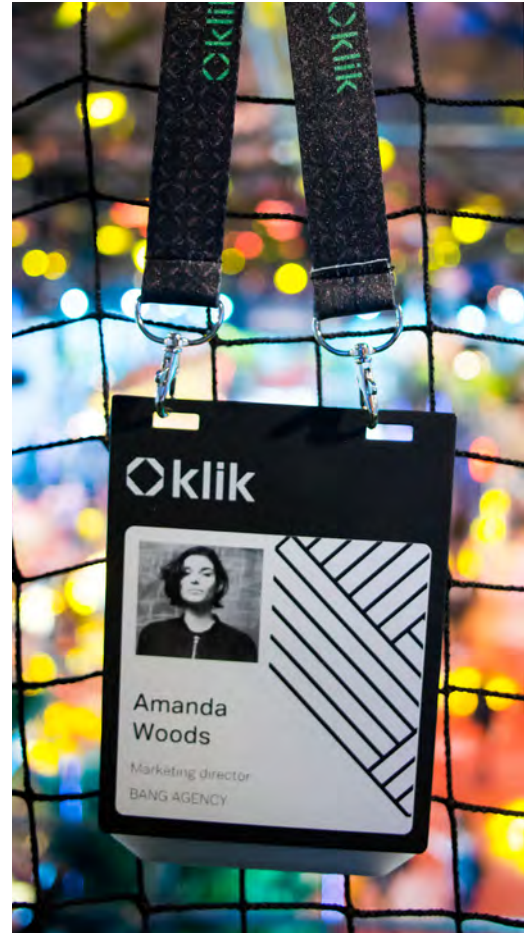
Key takeaways:

- This is a permanent change and something that goes well beyond insight.
- Everyone is involved; nobody is excluded.
- Systemic issues mean thinking about how systems get built and re-built.

NETWORKING & FUN

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.



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.



Enjoy an opportunity to dine and network with your fellow industry colleagues and professionals by joining us for a Dine-Around!

The Quirk's Dine-Around will allow you the option of selecting a seat at a table at a local restaurant with other attendees. It's a great way to network and meet others in the industry while enjoying a great meal!

All transportation, food and beverage costs are your own. To find out more go to thequirksevent.com

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!



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.



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.



TheQuirksEvent.com

REGISTRATION COMING SOON!

YOU'LL BE IN GOOD COMPANY...

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



| 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&CE | 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 | Elky | Ellevest | eMoney Advisor | Empower MM | Endeavor | Epon America | Epon 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. J. Keller & Associates, Inc. | J.P. Morgan | Jazz Pharma | John Deere | John Lewis Partnership | Johnson & Johnson Vision | Johnson Outdoors | Johnsonville | JPMorgan Chase | Juji, Inc. | Karma Automotive | Kashi Company | Kawasaki Motors Corp. | KB Home | **Kellogg's** | Kennedys | Kia | **Kia Motors America** | Kimberly-Clark Corporation | King's Hawaiian | Kingfisher | Klick | Kolcraft | KraftHeinz | L'Oreal | LA Tourism and Convention Board | Lamb Weston | Land O' Frost | Lbg | LeapFrog / VTech Kids | Leeds Building Society | Legal & General | LEGO Group | Leonard Cheshire | Liberty Mutual | Library Journal | Lifestream | Lincoln Financial | LinkedIn | Linney Group | Lionsgate/Pantelion Films | Live Nation | Lloyds Banking Group | London and Partners | Lowell Group | Lubrizol Ltd | M Booth | Macmillan Cancer Support | Maesa | Marcus Thomas | Marks and Spencer food | Markwins Beauty | Mars Wrigley | Mass General Brigham | Matalan | Mattel, Inc. | McBride Research Laboratory | McDonald's | MCG Health | McGraw Hill | McGraw-Hill Education | Meredith | Meriwest Credit Union | Meta | Meta Platforms | MGA Entertainment | Michelin NA | **Microsoft** | Midea America | mitú | Moët Hennessy USA | Molson Coors Brewing Company | Mondelez | Mondelez International | Monet Networks | MoneyGram International | Morgan Stanley & Co | Morningstar | Motorola Solutions | MTA | **Mutual of America** | Mutual of Omaha | National Association of REALTORS | National Debt Relief | National Safety Council | National Theatre | Nationwide | NatWest Group | NBC Universal | NBC Universal / Sky | NEC Group | NEJM Group | **Nestlé** | Nestle Confectionery | Nestle Health Science | Netflix | Neurocrine Biosciences | Neurogena | Newell Brands | Newland | News UK & Ireland | Newsday | Nintendo of America | NJOY | Noom | Nordstrom | Northwest Energy Efficiency Alliance | Northwestern Mutual | Novamex | Novartis | Oakley | OANDA Europe Limited | Oliver Murphy Design Limited | Ontic | Orange | Organic Valley | Organon, LLC | Otter Products | OVO energy | P&G | Pacific Life | Panda Restaurant Group | Panoramix Global | Paragon Bank | Paramount Pictures | Parent Teacher Week | PBS | PDI Software | Pearson | Pella Corporation | Penguin Random House | Pepsi Lipton | **Pepsico** | PepsiCo International | Pernod Ricard | Perrigo | Pets at Home | Pixel United | Pollen | Post Office | Practicing Excellence | Premier Foods | Prestige Consumer Healthcare | Principality Building Society | **Procter & Gamble** | Progressive Insurance | Proof Insight | PTC Therapeutics | Publix Super Markets | PWC | Quaker-PepsiCo | Quest Diagnostics | Quorn Foods | R&R Partners | R/GA | Radiological Society of North America | Rana Meal Solutions | Reach Financial | Reckitt | Reckitt Benckiser | Red Bull | Rightmove | Riot Games | RLM | RMR Laboratories | Rockline | Rotary International | RSA | RVU | Rx | S&P | Sage Growth Partners | Samsung Electronics America | Sanofi Consumer Healthcare | Sara Lee Frozen Bakery | Sargento | SavageX Fenty | Sazerac Company | SC Johnson | Scientific Games | ScotRail | Seamless | Self Esteem Brands | Seven Tribesmen Brewery | SharkNinja | **Shell** | ShiftKey | Sigma Foods | Simple Mills | Skyscanner | SmithGeiger LLC | Sonic Drive-In | Sonos | **Sony Pictures** | Southern California Gas Company | Spacesaver Corporation | **Specialized Bicycle Components** | Specialty Equipment Market Association | Sport England | Sport Radar | Sport Wales | Spotify | Spruce Haven Farm | St Basils | St John Ambulance | Stanley Black and Decker | Stemilt Growers | Stone Mantel | Storck | Strategex | Strategic & Creative Marketing Inc. | Stryker | Subway | Suntory Beverage and Food Europe | Super Awesome | Swinkels Family Brewers | Swisher International | Symrise | Synchrony Financial | Taco Bell | Takasago International Corp | Talkdesk | Talking Rain Beverage Company | Tea Forte | Technowipe | TEKsystems | Tesco | The A.C. Nielsen Center for Marketing Analytics & Insights | The Aspen Group | The Business Journals | **The Clorox Company** | The Drum | The Greatest Hotels | The Hartford | The Hershey Co | The Honest Company | The J.M. Smucker Co. | The Lubrizol Corporation | The Marketing Store | The National Theatre | The People's Pension (B&CE) | The Perfume Shop | The Schwan's Company | The Sherman-Williams Company | The Stevenson Company | The Wonderful Company | Theramex | Thermo Fisher Scientific | Thomson Reuters | Tiffany & Co. | TikTok | Tillamook County Creamery Association | Toastmasters International | Tovala | Tractor Supply Company | Transport for London | Travelers Insurance | Trend Micro | TrueCar | TTI | Tulia Inc. | Tuttle Foundation Limited by Guarantee | Twitch Advertising | Twitter | Tyl by NatWest | Tyson Foods | U.S. Bank | Uber | UCB Pharma | UK Civil Service (Ministry of Defence) | **Ulta Beauty** | UM London | Uncorking a Story | Understood.org | **Unilever** | United in Purpose | United Methodist Communications | UnitedHealthcare | Universal Studios Hollywood | USAA | Utz Brands Inc | Vanguard | Vanguard Packaging | VELUX | Ventura Foods | Verizon | Viacom | Viking | Vimeo | Virgin Media O2 | Vlsa | Visit Fort Worth | Vital Farms | Vital Proteins, LLC | VMO2 | Vodafone | Volvo Trucks UK & Ireland | Voya Financial | Vue International | Vytalogy Wellness | W. L. Gore & Associates, Inc. | Walgreens | Walmart | Walt Disney Parks and Resorts | Warner Bros | Warner Media | WaterAid | Weber Grills | Weber Stephen | Welcome.Tech | Wendy's Western Governors University | Western Union | Whitebread | William Grant & Sons | Wolters Kluwer | Woodside Homes | World of Sweets | WorldatWork | **Wrigley** | WUA Global | WWE | Yoplait Europe | Zurich Insurance

●●● special advertising section

16 TOP PANEL RESEARCH COMPANIES

Finding qualified respondents for marketing research projects is challenging, especially if you're trying to source participants for niche topics. Panel companies can offer reliable respondents for any kind of project.

These research panel providers can help you find participants on a local, national or global scale. With a broad array of panels from health care to B2B, they can help secure your needed audience.



Audience Align

Founded 2022 | 7 employees
Mike Wagner, CEO

Audience Align provides quality, responsive and unlimited targeted online sample for your research projects.



We present you with seamless access to 650 million respondents across 146 countries profiled across all sample types. Our platform includes over 300 supply sources and we have proprietary tech in place that ensures you get the right respondent at the right time, all with Research Defender sitting confidently in the background to safeguard against bots and shady IP addresses. We offer budget-friendly pricing, meticulous project setups and a cutting-edge, proactive approach to filling quotas! We can help with qual recruitment, as well as P&H, translations and data services. Audience Align was created to make ordering sample quicker, cheaper and easier overall! No sense engaging individual suppliers on your end only to juggle multiple sets of links, quotas and reconciliations. Let us do that!

E-mail mike@audience-align.com
Phone 1-717-715-2216
www.audience-align.com



CatalystMR

Founded 2008
Adam Berman, CEO

A trusted global panel and market research services leader, CatalystMR's online and telephone research panels are widely recognized for our 40 million+ pre-targeted census rep consumers, B2B and



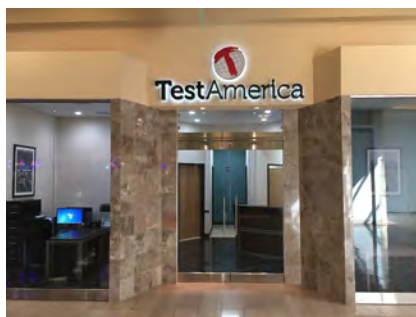
health care professionals across more than 50 countries. With 800+ profile targets, CatalystMR ensures a balanced representative of proprietary, quality-controlled populations across each panel community. Global B2B targets include SBOs, ITDM, C-level, financial planners, insurance agents; health care professional targets include physician specialists, nurses and administrators. CatalystMR also provides research support services including survey design and analysis; ad hoc online survey programming and reporting and telephone interviewing field services via a 200-seat multilingual CATI call center. Contact info@catalystmr.com.

Phone 1-800-819-3130
www.catalystmr.com



CRG Global Inc./Test America Online

Founded 1987 | 100+ employees
Dennis Barbelet, Senior Vice President, Online Panel



CRG is a full-service market research company with a proprietary online panel of approximately 500,000 respondents in the U.S. Nearly all our panel respondents were recruited in-person at our test studios. This ensures strong relationships with our respondents, leading to greater data integrity and best-in-class response and participation rates. We commonly partner with clients on online or hybrid research methodologies, especially for more task-related projects. We are an excellent fit for IHUTs, diary studies, ethnographies, qual/IDI recruits and more. As part of our comprehensive approach, we partner with several leading global databases with the goal of connecting B2B audiences, such as online influencers and creators, with both quantitative and qualitative research projects. Our proprietary panel and innovative approach enable us to curate the optimal respondent for your research.

Phone 1-914-570-4021
www.crgglobalinc.com



Eleven Market Research LLC.

Founded 2021 | 6 employees
Brandon Johnson, CEO

Why go to multiple partners when you only need one? ElevenMR is a unique mix of methodology, data collection and market research experts, with over 20 years of experience!



No matter your research objectives, we can help with your quantitative survey needs. We have you covered, with access to over 70 vetted online panels. Have a tougher audience? No worries! Our custom-dialed phone team excels with specialty audiences, such as lab directors, institutional investors and over \$1 billion-revenue companies, just to name a few. Need full-service project management? We do that too, including consulting, programming, screener review, data collection, translations and coding/tabulations. Let us show you what we're capable of. E-mail us at bids@elevenmr.com.

Phone 1-972-349-1138
www.elevenmr.com



Fieldwork

Founded 1980 | 350+ employees
Steve Raebel, President



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

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



FlavorWiki

Founded 2017 | 60 employees
Daniel Protz, CEO

FlavorWiki is a global product and consumer experience platform that provides the fastest, most efficient technology for consumer brands to collect, analyze and manage data from consumers all over the world. FlavorWiki combines advanced data and machine learning techniques with easy-to-use project management features that facilitate digital communication with consumers, colleagues and suppliers globally. Using unique technology, excellent customer service and professional expertise, FlavorWiki helps consumer brand companies stay competitive and build winning innovations in a sustainable and affordable way. Our always-on application is active in 100 countries around the world and it's available in 30 languages.



E-mail daniel@flavorwiki.com
Phone +41 79 137 2228
business.flavorwiki.com



Full Circle Research

Full Circle Research

Founded 2013 | 20 employees
Adam Weinstein and Nate Lynch, Co-CEOs



Named the 2021 Panel Company of the Year by The Marketing Research and Insight Excellence Awards (powered by Quirk's) and a staple on Inc. 5000's Fastest-Growing Companies (2017-2022), Full Circle leads the industry in data quality. The only U.S.-based, online consumer sample provider certified to ISO 26362; now certified to ISO 20252; and the founder of #QualityForAll, Full Circle's award-winning survey experience HoNoR (Holistic Next-Level Research)[®] marries advanced tech, flexible community strategies and industry-leading quality controls to deliver immediate access to proven-purest data. Full Circle's foresight, agility and innovations are a direct result of a uniquely consultative approach, delivered by diverse industry veterans.

Phone 1-301-762-1972
iLoveFullCircle.com



Global Survey

Founded 2008 | 50 employees
Mayank Bhanushali, Founder and Managing Director

Global Survey is your top-choice solutions partner for end-to-end project management needs. We augment your research operations by making available top-of-the-line infrastructure setup, proven processes and highly trained personnel for every stage of the operational lifecycle of a research study. Under this engagement model, you keep control over the client interaction and overall management while we help move the project successfully from survey scripting and data analytics to reporting and visualization. Engaging with us at Global Survey for our end-to-end project management capabilities provides multiple business benefits. You can apply economies of scale and execute a bigger volume of projects without the need to hire and maintain costly human capital in-house.

Phone +91-740322 0322
www.globalsurvey.gs



Harmon Research

Founded 2009 | 127 Employees
Joey Harmon, President and Founder

Top insight companies have turned to Harmon Research for high-quality data collection for over 13 years. Harmon Research's strength lies in our skills and service. We provide our clients with a proprietary panel that goes through constant quality-control checks. Every member can only



have one profile and they must complete a double opt-in process at sign-up. We continually review our database for signs of fraud or cheating and we use a digital fingerprinting system to confirm our subjects' identities. We also employ our cutting-edge DataDefense program, which conducts a line-by-line review of our data to ensure the insights we deliver are accurate and actionable. Our dedicated account management team is always available to answer questions and sharpen the scope of our research and our team of experienced researchers produce swift and cost-effective results.

Phone 1-714-881-2590
www.harmonresearch.com



InnovateMR

Founded 2014 | 270+ employees
Lisa Wilding-Brown, CEO

InnovateMR is a full-service and ResTech sampling company that delivers faster, quality insights from business and consumer audiences utilizing cutting-edge technologies to support agile research. Now offering a highly engaged and resume-verified B2B community for qualitative research through the acquisition of Ivy Exec, InnovateMR can engage the most sought-after industry experts for a broad variety of research projects and methodologies including focus groups, roundtables, quantitative sampling and more. As a leader in specialized research, this acquisition further accelerates InnovateMR's commitment to data quality and global B2B survey participant reach.

Phone 1-888-229-6664
www.innovatemr.com

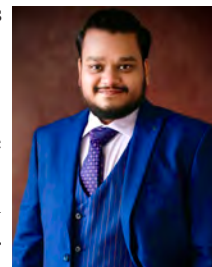


Insights Opinion

Founded 2015 | 50 employees
Sharoz Ghauri, CEO

Insights Opinion is a global leader in research outsourcing with exclusive expertise in online sampling for consumer, B2B and health care niches. Our fast-paced data collection services are augmented by over 8 million panelists worldwide. Notably, our research incorporates extensive coverage of North America, Latin America, Europe, APAC, the Middle East and the Caribbean along with 100 countries across the world. Clients entrust us with their research needs which are delivered with complete security as confirmed by our ISO 20252 and 27001 certificates. By incorporating domain expertise, perfectly customized services, exposure and scientific methodologies, Insights Opinion is emerging as a global leader in research outsourcing.

Phone 1-646-475-7865; +44 208 144 2786
www.insightsopinion.com



KANTAR

Kantar, Profiles Division

Founded 1996 | 600+ employees globally
Caroline Frankum, Global CEO

Kantar is the world's leading marketing data and analytics company and its Profiles division is home to the world's largest audience network. Our expertise in survey design, sampling methodologies and data science is amplified by tech. Our clients seamlessly access real people and enhanced insights through a range of survey-based solutions for a better understanding of people everywhere. Validated by industry-leading anti-fraud technology, Kantar's unrivalled Profiles Audience Network of over 169 million people spans 100+ countries and includes consumers, B2B audiences, health care professionals, patients and other permissioned data connections. We focus on quality and delivering the most meaningful data with consistency, accuracy and accountability – all at speed and amplified by technology.



Phone U.S. 1-866-471-1399;
U.K. +44 (0)20 7656 5700
www.kantar.com/profiles



Mindfield Online Internet Panels

Founded 1980 | 110 employees
Gary McMillion, CEO

Still the premier online consumer proprietary panel! Powered by 40+ years of market research and data collection experience. We were a tenured and respected research company long before creating a high-quality proprietary panel using core industry principles to insure quality data (IQD) on every project. Our IQD real-time electronic countermeasures deeply line every project to eliminate quality issues as they occur and our panel is 100% Experian Data Quality verified. Let our experienced team help you with the hard and easy projects on your board.



Phone 1-800-969-9235
MindFieldOnline.com



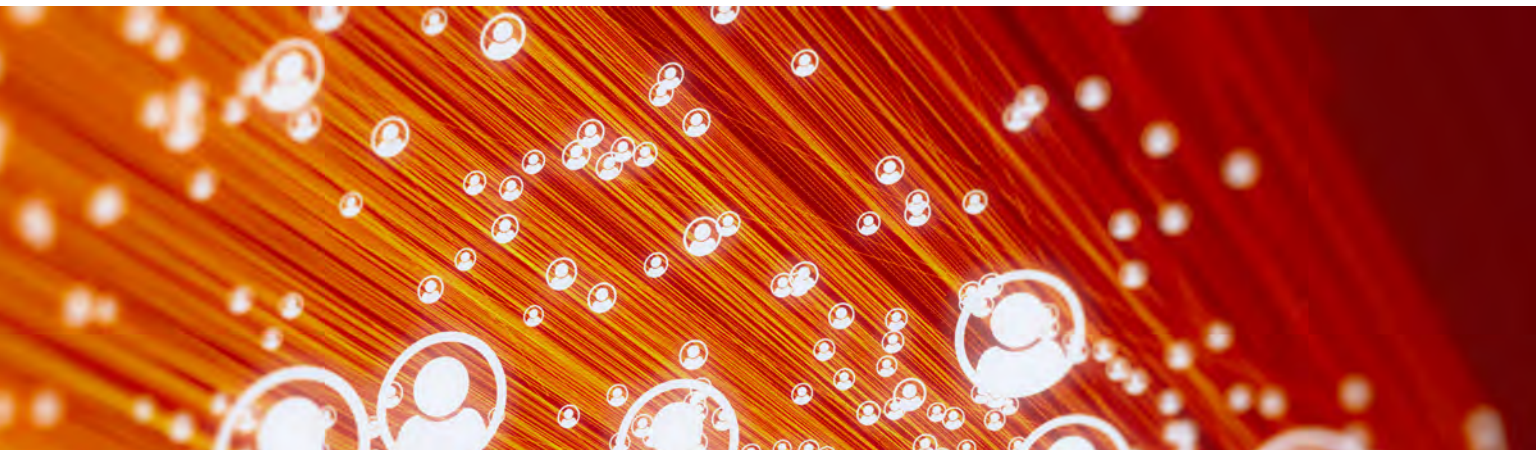
OvationMR

Founded 2017 | 20+ employees
Jim Whaley, CEO



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

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





Rare Patient Voice LLC

Founded 2013 | 20 full-time, 20 part-time patient advocates
Wes Michael, President and Founder

Celebrating our 10th anniversary in 2023, Rare Patient Voice (RPV) recruits patients and family caregivers of rare and non-rare diseases in the U.S., Canada, U.K., France, Germany, Italy, Spain, New Zealand and Australia for qualitative and quantitative market research. We attend patient conferences and work with over 3,000 referral partners to build our panels. We focus on recruiting and can complete recruits within two weeks. Over 100,000 patients and caregivers across 1,400+ diseases/conditions are part of the RPV community. Our panels include all cancer types, Crohn's, cystic fibrosis, diabetes, epilepsy, Fabry, Gaucher, hemophilia, HIV, Huntington's, multiple sclerosis, primary immunodeficiency, PNH, pulmonary hypertension, sickle cell and spinal muscular atrophy. For a bid with feasibility and costs: <https://pam.rarepatientvoice.com/>. Learn more about Rare Patient Voice and our services: <https://youtu.be/NbOB-5KpzLo>.



Phone 1-443-986-1949
www.rarepatientvoice.com



Symmetric, A Decision Analyst Company

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

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CALENDAR OF EVENTS

●●● can't-miss activities

Market Research Society will host Insight Alchemy 2023 on **March 14** in **London**. Visit www.mrs.org.uk/event/conferences/insight-alchemy-2023-mrs-annual-conference.

The Research Club will host the London MRS Annual Conference Networking After Party on **March 14** in **London**. Visit theresearchclub.com/events/london-mrs-insight-networking-after-party.

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

Informa Connect will host The Future of Work on **March 14-15**. Visit informaconnect.com/consumer-insights.

Worldwide Business Research will host eTail Germany on **March 14-15** in **Berlin**. Visit etailgermany.wbresearch.com.

European Pharmaceutical Market Research Association will host the UK Chapter Meeting on **March 21** in **London**. Visit www.ephmra.org/events/28.

University of Texas at Arlington will host The Insights Collaborative on **March 21**. Visit msmralumni.com.

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

Mystery Shopping Providers Association will host the Operational Excellence Workshop on **March 23** in **Amsterdam**. Visit bit.ly/3xjbhSa.

Corinium Global Intelligence will host CDAO APEX Mexico on **March 23-24**. Visit cdaoapex-mx.coriniumintelligence.com.

The Research Club will host the Quirk's Chicago Social Mixer on **March 26**. Visit theresearchclub.com/events/chicago-quirks-social-mixer.

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

Corinium Global Intelligence will host Data & Analytics in Healthcare on **March 27-28**. Visit datainhealthcare.coriniumintelligence.com.

IQPC will host the CX USA Exchange on **March 28-29**. Visit www.cxnetwork.com/events-customer-experience-exchange-usa.

Society of Insurance Research will host its Research Workshops Summit on **March 28 & 30**. Visit bit.ly/3lurAu

Worldwide Business Research will host eTail Asia on **March 29-30** in **Singapore**. Visit etailconnectasia.wbresearch.com.

Corinium Global Intelligence will host CDAO Canada on **March 30-31** in **Toronto**. Visit cdao-canada.coriniumintelligence.com.

Pharma Market Research Conference will host the Pharma Market Research Conference Europe on **March 30-31** in **Rome**. Visit pharmamarketresearchconference.com/europe/about.

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

Population Association of America will host the PAA Annual Meeting on **April 12-15** in **New Orleans**. Visit www.populationassociation.org/paa2023/home.

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

Corinium Global Intelligence will host CDAO Singapore on **April 19-20**. Visit cdao.sg.coriniumintelligence.com.

Intellus Worldwide will host Where Great Minds Meet on **April 20** in **San Francisco**. Visit www.intellus.org/Events-Webinars/Regional-Events-2023.

Insights Association will host its 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** in **Mexico City**. Visit esomar.org/newsroom/latin-american-call-for-speakers.

Event details as of January 31, 2023. Please see websites for more details.

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10 minutes with...

Rita Chen

Vice President, Marketing, Choose Chicago



“I would consider formal and informal ways to improve your skills. Part of the experience is to test and learn.”

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



How did you first become interested in marketing research?

I first became interested in marketing research in college. I took a course, and I was hooked. Even though I graduated as a marketing generalist, I have always incorporated research into planning and strategy and decision making. It was during my time at 3M in the strategic marketing group where I really honed my marketing research skills and expanded my toolkit. I was able to work on some amazing projects with brands like Post-It Flags and Thinsulate that required primary research. I had the chance to conduct focus groups, conjoint analysis and work on my questionnaire design skills.

Do you have any tips for marketing professionals looking to improve their marketing research skills?

The focus of marketing research is to guide and support marketing – and business – strategy and planning decisions. You need the data to get to the insights which lead to recommendations. You must start with a goal identifying what problem you need to solve for. And from there, determine the methodology – primary vs. secondary or a mixture of both – that will help you answer the questions that are critical to your goal.

I would consider formal and informal ways to improve your skills. Part of the experience is to test and learn. Shadow someone for a day within your organization in research or have informational interviews with people in your network. Try being a moderator of an informal focus group. I had no research budget at City Winery, but we wanted to hear from current members and those members who were less engaged, and I designed a moderator's guide to help us get the data needed to develop new membership tiers – and I fed them wine and cheese for their time. Find marketing research agencies that specialize in your industry. There are a lot of great groups where you can learn more. I recently presented at an Insights Association event, and it has local chapters around the country. I connected with them through the Quirk's Chicago Event last year!

Based on your experience, what makes a great marketing research supplier?

I have the good fortune to work with a leader in marketing research in the tourism space, SMARInsights. The relationship was formed before I joined Choose Chicago but because of their expertise in our space, they have proven to be a valuable partner time and again.

There are three qualities that make a great research partner: First, they understand the larger picture, the strategy behind what you want to accomplish and your goals. Second, they work well with other agencies and vendor partners and don't let pride get in the way. Third, they provide timely data and know how to translate those data points into insights and actionable recommendations.



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