QUIRK'S

For marketing research and insights professionals

Creating a buzz

How research helped develop the go-to-market strategy for a new cold brew coffee

PLUS

Don't leave emotions out of B2B marketing

How D2C and subscription consumers are different

Why we need more Black representation in research

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Quirk's Marketing Research Review

MAY/JUNE 2023

VOLUME XXXVII NUMBER 3

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May/June 2023 • Vol. XXXVII No. 3

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Now accepting nominations!

The Marketing Research and Insight Excellence Awards are back for their fifth year. The nomination portal is open now. Nominate yourself or fellow researchers in one or more of our 18 categories. Early bird pricing ends **June 2** and nominations close **July 24**. You can't win if you don't enter! Find out more at **www.quirksawards.com**.

// E-newsworthy

Work and play: Roller derby and LGBTQ+ advocacy in marketing research

Linking the heart and the mind: How latent emotions drive decision-making

Legislation and data security changes affecting the marketing research and insights industry

Addressing organizational health in the marketing research and insights industry

Conducting a research study? Tips for getting better insights from participants

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How to attract and maintain market research professionals
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quantilope

The Consumer Intelligence Platform

Generate high-quality insights while saving significant amounts of time and money with quantilope.

Offering the largest set of automated advanced research methodologies and an easy-to-use automated tracking solution.

••• consumer psychology

Group-focused deals appeal to worried shoppers

Offering discounts to consumers based on the affinity groups they belong to – teachers, military members, health care workers, etc. – has a strong appeal, according to a recent study by Centiment for marketing firm SheerID.

The survey of more than 4,000 U.S. and U.K. consumers examined shopper habits in the face of an expected economic downturn. Against that backdrop, when asked what would motivate them to try a new brand, 66% indicated "an exclusive discount for my community" as the preferred option. This was by far the most popular tactic, beating out a general discount (55%), better customer service (37%), access to buy-now-pay-later financing (26%) and personalized offers based on interests collected from their website activity (19%).

Sixty-two percent of students, 65% of the military and 78% of teachers said receiving a special discount for their communities would motivate them to try a new brand. More than 60% of the consumer communities surveyed said they feel more emotionally connected to brands that give them an exclusive offer. Surveyed students said they feel excited (58%), while other communities – health care workers (58%), teachers (63%), first responders (63%) and military (63%) – feel appreciated.

Seven in 10 consumers belonging to identity-based communities said they are more loyal to brands that give them an exclusive offer. And exclusive offers turn consumer communities into brand advocates at an even higher rate. More than nine in 10 said they would share an exclusive offer with others who were eligible for it.

••• health care research

Software seen as Rx for health care leaders

Faced with two widely publicized health care industry headwinds – clinician burnout and a potential recession – 94% of leaders who are responsible for implementing and purchasing technology at health care provider organizations plan to invest in software to proactively address them.

The survey of than 300 provider leaders, conducted by PureSpectrum for health care data enablement company Intelligent Medical Objects, found that while they are experiencing a multitude of threats – both internal and external – 71% cited maintaining or improving clinical care quality as the most important internal risk, followed by clinical staff burnout at 65%, administrative staff burnout at 50% and data issues (fragmentation, management, optimization) at 45%.

Almost all (98%) respondents openly acknowledged that their organization must improve the way it leverages data to confront its challenges, citing investment in software to address administrative challenges as a priority. Trouble is, that requires working with software vendors, and 84% of provider organizations report working with more than 20 individual vendors, which can create integration and management nightmares for everyone involved. The most-cited frustrations about software vendors included: trouble with software integrations (32%), inadequate training provided by vendors (29%) and long implementation timelines (17%).

By Joseph Rydholm, Quirk's Editor

We loved L.A. and L.A. loved us back

©Clare Pix Photography www.clarepix.com

Joe Rydholm can be reached at joe@quirks.com

With our Chicago Quirk's Event just behind us at the time of this writing in early April, we're halfway through our four-event schedule for 2023. Our return to California for our Los Angeles-area event in February (first time back since 2018) was a blast and if we couldn't bask in balmy temps, thanks to some wild weather, we at least felt the warmth of an appreciative group of West Coast corporate researchers and vendors, who were energized by two days of learning and camaraderie.

Recapping our events is always a bit hard because we don't organize our gatherings around topic tracks and I never want to force together a bunch of loosely related observations just for the sake of it. Instead, I thought it best to pass along a few of the disparate tips and strategies that those on stage imparted in Burbank.

- When presenting results to internal audiences, PepsiCo's Director of Consumer Insights Laura Saeva said, make things as simple as possible. Let them know the research work was rigorous – no need to dumb things down – but feel free to leave out the methodological detail so the focus is on the findings and their implications.
- Echoes of that point came in a panel from researchers Mike Swiontkowski (Blizzard Entertainment), Dave Pierzchala (Intuit) and Laura-Lynn Freck (Zevia) on strategies for answering your organization's questions. Internal audiences don't always need to or even want to know all about the methodologies, Swiontkowski said, adding, "What they need to know is, can I trust [the research findings] and can I trust you, the researcher?" Building that trust – in the internal research process and in the data that results from it – breeds confidence now and in the future.
- Cristian Young, AVP insights and knowledge management at AT&T, offered a useful definition of insights as part of his larger discussion on the company's launch of a knowledge management system. There can often be different internal views of what an insight is and to avoid wasting time hashing out those differences, Young said it's been helpful to agree on one at the outset. Here is the option he and his team settled on: Insights are simplified and compelling narratives based on research findings or analyses that deepen understanding and enable decision-making.
- During her panel with Glassdoor's Bonnie Chiurazzi and BCG X's Jordan Hopson, Alanna Shipley, head of audience insights at DoorDash, said that once a quarter, she brings in new and prospective vendors to get to know them and their capabilities before a specific need arises so that options are at the ready down the line. She also asks current vendors to put effort into understanding DoorDash's business, so that when it comes time to report out results, the whole team looks smarter – the vendor for being aware of the client's business needs and the internal team for having chosen a well-informed vendor partner.
- In a solo speaking session, Intuit's Pierzchala also implored prospective vendors to do the basic step of visiting the potential client's website to familiarize themselves with product offerings – a not unfamiliar request that's been echoed by many respondents to our annual Q Report corporate researcher surveys over the years. Vendor sales teams, do your homework!
- And finally, I hesitate the use the word "tips" anywhere near a discussion of the session featuring two researchers from Manscaped, the (choosing my word order carefully here) male grooming tool company, though doing so would be right in line with the pun- and double-entendre-heavy session, which was probably the funniest and most wince-inducing 30 minutes our industry has ever witnessed. Major props to Manscaped good sports Monica Aguilo and Tori Herman for playing their parts in the heavily scripted exchanges with Ipsos's David Bilicic and giving the SRO audience good advice on how to conduct smart research when your work is in danger of being derailed by nervous jokes from everyone involved. As a two-person insights team they've learned to make a difference by creating awareness of the work they are doing by functioning as internal truth tellers, by cultivating internal research champions to grow support for the insights process and by socializing their research findings through C-suite road shows and share-outs of findings.

••• advice for researchers

ASK THE EXPERT

Expert answers to important research questions.

How can insights more effectively guide creative effectiveness?

For all the breakthroughs, promises and aspirations across marketing insights, the fundamental goal still eludes most teams: Put the right message, in front of the right person, at the right time to convert to purchase.

The realm of behavioral science bears the potential to progress this agenda yet when it comes to creative and content effectiveness, most conversations center around measurement and attribution. In other words, measuring performance AFTER creative development.

What's more, many market research outputs remain in the domain of the squishy: interesting, maybe even exciting, but quite difficult to translate into creative briefs. As a result, we've all experienced the dynamic where creative teams participate politely in insights briefings but then struggle to activate on the guidance.

But there's a brighter path forward. Using more emergent techniques to focus more deeply on the true WHYs behind consumer and shopper behavior illuminates creative shortcuts that translate directly to real life decision making.

A quick primer on two simple, yet seminal, principles to consider in your work:

1. Locus of control
2. Facts vs. feels

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

ALPHA-DIVER

Locus of control

This one sounds kind of fancy but it couldn't be simpler. Does your ideal consumer want to have more control over and via your category or do they want to be absolved of having to exert control? This has huge bearing on the creative content that will capture attention and drive behavior.

Imagine a person trying to choose what to make for dinner. Do they:

A. Make a weekly menu, look up new recipes online and learn new cooking techniques, OR

B. Wander the aisles, order from DoorDash and simply want good meals on the table made easy?

Consumer A has an internal locus of control and they want to remain in control via communications and content.

Consumer B has an external locus of control and wants to be absolved of having to even be in control via communications and content. Which leads to the second principle:

Facts vs. feels

If they want control, they make decisions via the FACTS.

- Words and numbers over pictures or imagery – this brain function relates directly to verbal communication.
- Side-by-side comparisons – they want to make an informed choice based on their expertise over your category space.
- They're mission shoppers – they make a list, decide on categories and brands well ahead of shopping.

If they want absolution, they make decisions via the FEELS.

- Pictures and videos over words and numbers.
- High sensory content – they decide with their senses, not their rational brains.
- They're ambient shoppers – they make decisions on-the-spot, based on following all five senses to guide them to what FEELS best.

In your next insights project, focus on understanding their desire for – or against – control and brief your team accordingly to leverage the facts or the feels.

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.

2023
INSIGHT
PLATFORMS

17 Top INSIGHT PLATFORMS for 2023

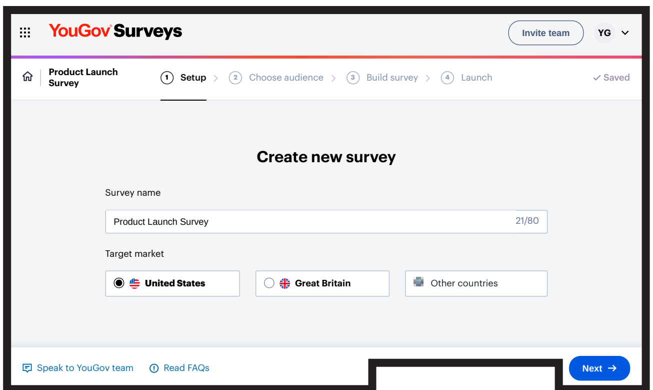
Survey Platform

Rapid panel-powered surveys with granular targeting

YOUGOV

YouGov's new self-serve Surveys platform allows agencies and brands to run rapid-response surveys to its industry-leading online consumer panel. With an easy-to-use, flexible survey creation workflow, YouGov Surveys lets you quickly select a target audience, choose a sample size and draft your questionnaire. Once submitted, initial results start coming in after just one hour, with full completion in 24 hours.

As pioneers in the online market research space, YouGov has built a verified, engaged panel of 22+ million global consumers – including 5+ million in the U.S. – providing the scale to reach niche groups. The platform allows users to filter and refine target audiences, utilizing more than 2 million datapoints – from demographics and brand usage to media consumption habits and attitudes on current events.



Survey results can be viewed in YouGov's Crunch tool. YouGov Profiles customers can also analyze survey data against the thousands of variables available in its syndicated audience intelligence platform.

With surveys priced as low as $1 per respondent, the YouGov Surveys self-serve platform is ideal for obtaining rapid insights for briefs, testing ad creative or messaging, informing product development, measuring price elasticity or other strategic decision-making. For brands needing support to develop a survey questionnaire or wishing to publish results, YouGov also offers serviced surveys with its expert research team.

Visit business.yougov.com to run your first survey today.

business.yougov.com/product/survey-direct

Exploring data through the varied lenses of our service offerings

THE DATA-FIRST APPROACH AT MARKET EXPERTISE

Have you ever observed the way a human mind processes data? It captures the varied stimuli it receives in its ecosystem. In a similar way, our outlook towards data is also programmed to make the most of the information we gather.

Being a data-driven enterprise, our work at Market Expertise involves deep-diving into the world of data and carefully weaving it all together to help global enterprises and decision makers with actionable intelligence.

What makes it possible is the dual blend of inculcating a culture of excellence within our teams along with advanced tech analytics. Our integrated platform offers the most in-depth and far-fetched reach for our clients who are exploring solutions for some of their complex challenges.

Some of the key features of our insights platform are:

1. **Data scalability** – Our processes are well-equipped to manage data of any size and complexity.
2. **Analytics architecture** – The tech analytics architecture of our platform is programmed to encompass the minutest element of data.
3. **Governance standards** – Our insights platform is governed by the highest ethical values, offering the required levels of global market research standards.

The overall delivery mechanism at our data lab is engineered to offer cost-effective and budgeted services across all enterprises globally to undertake market research activities.

How exactly do we assist our clients?

Survey programming: Asking the right questions is a skill. Our intelligence desks are specially modelled to design comprehensive and bespoke surveys across varied industry subjects, geographies and audiences. This helps our clientele achieve a 360-degree assessment of the marketplace, from markets, sectors, to any potential niche trends.

Behavior analysis: Trends are formed by a collective set of behaviors and those who ride these trends dominate the marketplace. Our survey techniques are specifically crafted to reveal the upcoming behavioral trends with consumers, markets and economies in general.

Market research: Data needs to be explored. With a futuristic outlook, our teams help you explore data like never before, going beyond conventional parameters to unlock deeper insights.

Lead optimization: We blend marketing with a targeted approach, creating a maximum impact for your brand. Positioning matters as it builds a narrative for your brand and impacts your prospective consumer when it matters most.

Let's imagine "data" like never before!

market-expertise.com

Survey Platform

Connecting real voices to research

RONIN EDGE

Our proprietary internal participant database, RONIN Edge, is designed to find the right research participants for your project. With over 25 years of experience and a database of validated professionals, you can trust that you are getting accurate and reliable data.

What is RONIN Edge?

It's not a panel, but a database of validated, targeted individuals who have agreed to future survey research with RONIN and on behalf of our clients.

Housing a database of more than 400,000 verified and engaged business professionals, from HR leaders and CFOs to sustainability experts and academics, we have the comprehensive professional database you need for your next research project, along with more than 1.5 million organizations across the world with key metrics such as employee counts, global revenue and industry classification to support our data collection operations. We can communicate with these hard-to reach participants in a language they speak and at a time that best suits them. Whether through a phone, e-mail or via digital platforms.

We go beyond data – we provide scale

RONIN Edge is designed specifically for qualitative and quantitative market research, giving you accurate and reliable data.

Find out how RONIN Edge can accelerate your next project, whether quant or qual, online or offline. RONIN, we get people, real people and real data.

www.ronin-edge.com/welcome-to-edge

Behavioral Insights Platform

EyeSee: Tech-enabled behavioral insights agency with a full-service approach

EYESEE

Exactly 10 years ago, Olivier Tilleuil set a unique challenge: he wanted to bypass the inbuilt limitation and low predictive power of surveys and focus groups by making behavioral methods less cumbersome and more commercially viable. A simple, yet brilliant idea of using widely available webcams on the respondents' devices made the need for central location testing obsolete. This turned highly predictive eye tracking, facial coding and virtual shopping into scalable options for brands across industries.

Today, we have over 150 insights, data and business experts based in seven global footholds who are bound by agility and ambition to be on the frontline of consumer behavior knowledge.

EyeSee's research formula is based on three ingredients:

1. **A unique combination of methods** – A mix of proprietary behavioral and conventional methods delivers actionable insights with higher predictive power.
2. **Ready-to-use testing environments** – Immersive shelf and store contexts, as well as major social media feeds allow for a natural shopping experience for respondents, and therefore, insight into more authentic behavior.
3. **Client co-creation** – Each project pushes us to develop new, smarter insights solutions.

We helped over 50% of the top 30 CPG brands, media, tech and health care companies grow their businesses by testing in 50+ markets with an end-to-end project mentality. This highly adaptive formula is used for testing packs, planograms, online paths-to-purchase, claims, social media ads, TVCs and many more.

www.eyesee-research.com

"Holy real-time analytics..."

MINDFIELD

That is exactly how an insurance industry end-client reacted to the #CX platform prepared for them by Mindfield. "It was completely turnkey. I had the ability to securely load our customer sample via API into the platform and blinked and I was seeing survey results and open-end responses. This data allowed our sales force to make actionable insight decisions and close opportunities we may have missed out on. Our business has not been the same since engaging the insights and data integration experts at Mindfield."

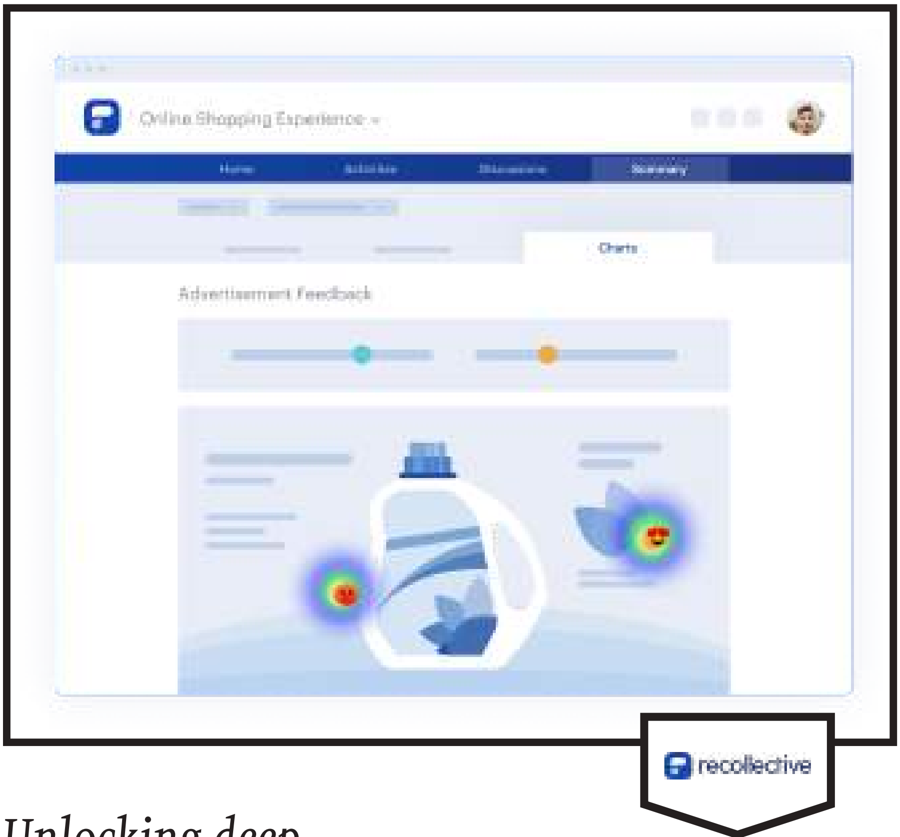
Mindfield has been creating completely customized platforms for end-user and supplier-side clients for more than 15 years. Mindfield SVP Jay Mace says, "It began in a meeting when the client said they could not wait for the day when they could survey their customers as they shopped, or at least as soon as they left the store. My response was, we can do that now." The collaboration led to a major shift. The client, a large retailer, began sending Mindfield app and other data in real-time as customers shopped. Today, Mindfield uses these metrics to field a library of real-time surveys based on the actual customer experience. "One survey might ask about new branding in the meat department while another might ask about a specific product decision based on receipt data. We then use an integrated priority structure to determine who gets which survey," says Mace.

Recently, global expansion has allowed Mindfield to start work for large streaming services, network TV, sports venues, restaurants and more. "Essentially, we can intake whatever data a client wants to send us and turn that around into actionable insights." Imagine asking your streaming customers their thoughts about episode four of their favorite series within minutes of finishing the episode. It is the new way to capture insights and just one way Mindfield is changing the face of the insights industry.

"As a consumer, it is important to me to know that companies care about what happened while I'm actually shopping. Not weeks later," said a survey taker. Another said, "It's cool to know my opinion about what I watch is being used to make my experience better each and every time."

Yes, "holy real-time analytics" is exactly how what Mindfield is doing can be described. They are ready to bring solutions to your needs as well.

mindfieldtech.com



Unlocking deep insights: Combining social interactions and innovative tools to drive research success

RECOLLECTIVE

Since 2011, leading market research agencies and global brands have chosen the Recollective platform as the foundation for their online research projects and engaged communities. Recollective combines a tech-first approach with meaningful customer partnerships to drive innovation within the product and the market research industry. Using an integrated suite of both asynchronous and live video features, our research customers can quickly unlock insights that drive success for their clients and brands.

To do this, Recollective uniquely blends the social interactions of a highly-engaged online community with a professionally designed suite of qualitative and quantitative research tools. This enables researchers to not only reveal deep insights quickly and cost-effectively, but also to connect with and keep participants highly engaged over any duration. The Recollective platform includes social media-style news feeds of responses, comments and discussions. These streams can be filtered by segment, participant, activity, task and discussion to quickly view content, photo walls, video walls and a dashboard.

Easily create customized activities that are revealed to participants by segment, date or sequence. Activities combine tasks to complete open-ended text, photo upload, video (upload or webcam), poll questions, fill-in-the-blanks, images and video review and annotation, card sorting/ranking and more. However you build an activity, participants are always presented with an engaging interface with interactive activities to ensure maximum completion rates and engagement.

Recollective's power extends to analysis too. Any response, discussion post, private message or comment can be marked up to create an excerpt which itself can be tagged with one or more codes defined on-the-fly, annotated, charted and exported for analysis. Researchers can combine segment data with custom profile fields/logic to automate the assignment of participants to Smart Segments. Those same segments can also be used to export or analyze responses.

Recollective offers both technology and research services to customers as needed, although the platform was designed to be a self-service tool and services are not required. Each site can be custom branded, is fully mobile-ready and can support small or large populations for any duration required.

Request your free demo or consultation today to get started with the industry's leading qualitative research platform.

recollective.com

Consumer Insights Platform

What if brands could go into the consumer's mind in real time?

REVUZE

Once upon a time, businesses relied on traditional market research methods like focus groups and surveys to understand their customers' needs and preferences. With the rise of fast-paced digital e-commerce channels and social media, traditional methods proved to be inadequate in capturing the full scope of customer sentiment and feedback in real-time.

That's where Revuze comes in. With its advanced natural language processing technology, Revuze can analyze customer feedback across all e-commerce

platforms around the world and provide businesses with valuable insights. The platform offers a data warehouse of market research answers, making it an industry leader in delivering ready-to-use comprehensive market research solutions.

Revuze has quickly established itself as a trusted and innovative player in the market research space, with prominent investors like Nielsen and SAP backing its cutting-edge technology. It's not just the technology that sets Revuze apart but also its commitment to providing businesses with actionable insights that help define winning brands.

Recently, Revuze was recognized for its innovative use of technology at the U.S. CXA 2022 competition, winning the Best Use of Technology award. This year, Revuze is a finalist in the CX Evolution category for Best Digital Transformation and Best Innovation in CX, highlighting the company's commitment to CX innovation and digital transformation.

Revuze's story is one of innovation and commitment to delivering real-time consumer insights to some of the largest brands worldwide. With its advanced technology and industry recognition, Revuze is poised to continue its growth and success in the market research industry.

www.revuze.it

Open-End Analysis Platform

New CXI Go with Theme Extractor

THEME-BASED INSIGHTS ARE INSTANTLY EXTRACTED FROM OPEN-END COMMENTS

Wish you could easily uncover insights from open-end comments but don't have the time, money or right solution for the analysis? New CXI Go with Theme Extractor is a simple yet powerful DIY text analytics solution which quickly identifies the top insights from text comments with minimal effort at an affordable price.

- **Load to insights:** Load your file with one click and charts immediately appear identifying the top insights. Easily export the data and visuals.
- **Instant themes:** Our new Theme Extractor reveals the top ideas immediately. Similar to complete thoughts, themes do not require additional digging like single-word topics.
- **Click through** the insight to see individual responses.
- **Customize results:** Easily edit the data and visuals, apply sentiment, filter by variables and even create crosstabs.
- **It's simple:** No manual coding, no rulesets, no taxonomies.

Businesses have trusted Ascribe to help analyze open-end comments for over 20 years.

CXI Go is our latest innovation, delivering valuable insights from open-ends with minimal effort at an affordable price, making advanced AI text analysis available to everyone.

Start your free trial now at app.cxigo.com!

Report Automation Platform

Do you really enjoy hand-posting numbers and hand-creating infographics?

E-TABS

Let's go on the assumption that the answer to that question is a resounding NO! Automated charting and reporting have come a long way and it's now possible to fully automate both PowerPoint and Google Slides. E-Tabs is a data visualization and reporting software company with award-winning solutions that have been revolutionizing the way insights professionals deliver their reporting for over two decades.

E-Tabs' solutions provide an easy and efficient way to pull data from multiple data sources directly into even the most customized and complex templates – quite literally using any PowerPoint or Google chart you may already have in your templates. It's now even possible to pull data from your choice of customized data visualizations and infographics – all this in a fraction of the time it would have taken to do manually and with the added assurance of accuracy with the data coming directly from your source files.

One of the key advantages of this approach is flexibility – any template, any mixture of charts, graphs and tables. Automate statistical significance indicators, brand logos and flags with conditional formatting and the ability to include calculations to compare waves or results against benchmark values. With an open API, the new cloud-based platform can pull data from dashboard solutions such as PowerBI and Tableau and pull data into fully editable, native PowerPoint/Excel and Google Slides/Sheets exports.

Take advantage of the automated alternative to hand-posting and create more time to spend on growing client relationships and doing further analysis while the automation does the charting!

www.e-tabs.com

If you want status, don't settle for quo

INFOTOOLS

Being a world-class market researcher is no easy feat. Determination and curiosity help us truly understand how people think and behave, while courage enables us to adopt newer ways of working and keep up in an ever-changing world. If we stay with the status quo, we shouldn't expect anything but diminishing returns. But shouldn't we want more?

The status quo in market research is doing things the way they've always been done or making nothing more than an incremental change. Crosstabs or charts pasted into PowerPoint is often the default but that doesn't even reach the status of incremental change. If you're intent on remaining just a competent market researcher, stay on the PowerPoint path. But, if status and reaching the top is the goal, then please read on.

Be famous not forgotten

One way market researchers can reach the pinnacle of the industry is to work for or replicate the processes of an organization that embraces modern practices in market research.

Some of the world's largest brands maintain their excellence, in part, by using our fit-for-purpose market research investigation platform called Harmoni. Harmoni helps these organizations maximize their productivity in generating insights from multimarket, respondent-level data. They were brave enough to move away from the status quo. Are you?

Harmoni helps give you a competitive edge

If you have fears of technology taking your job, embedding it into your daily work life is the best way to mitigate that risk. On top of 30% to 50% efficiency gains, here's how our customers say Harmoni helps them in their roles as market researchers:

- **Do in minutes what took days.** Rather than manually combing through crosstabs for statistical differences, Harmoni's Discover function does it at the press of a button.
- **Minimize the impact of your biases.** Let Harmoni's pattern-finding algorithms first discover what the data represents and then use your experience and curiosity to dig deeper.
- **Spot changing consumer behavior.** Harmoni is a repository for helping brands track what consumers are thinking and how they're acting.
- **Maximize your market research investment.** Once data is loaded into Harmoni, you can keep throwing new questions at it as your understanding grows.
- **Increase the role of insights in your organization.** Harmoni's interactive dashboards and alerts enable you to be more responsive (and proactive) with stakeholders.

See how Harmoni can help take your role to new heights at infotools.com

www.infotools.com

Market Research Platform

LiveView® Research Platform

FOCUS GROUPS OF AMERICA

The LiveView® Online Research Platform is the tool you need to research without limits. Our primary goal is to fully recreate the in-person research experience within the comfort of your own home or office. We were the first to market with our Virtual Observation Room™, which divides clients and respondents using a digital mirror/wall, allowing you to keep your online focus groups separate from your observation rooms. We are pioneers in online data collection solutions. Focus Groups of America's online platform provides custom-built surveys featuring live reporting and our newest feature…LiveView® Notes in the Virtual Observation Room™ where you can read your respondents' minds – literally! On each of our projects we employ the aid of our dedicated tech support staff, as well as a live grid of respondents, putting the data in your hands and simplifying your research needs.

At Focus Groups of America®, Quality Research Starts with Us™. Schedule a demo, try the LiveView® Platform and see for yourself!

www.focusgroupsofamerica.com

End-to-End Insights Platform

Conduct research without limits through Toluna Start

TOLUNA

Toluna Start empowers insights professionals to conduct research without limits through a single platform that unifies the best of technology, the best of research science, the best of global panel and made-to-measure service to scale your business.

With a single log-in, you'll have access to an unparalleled combination of agile quantitative and qualitative research solutions – either through self-service or custom research programs built with the help of our team of experts. Quantitative solutions span across market understanding, new product development, brand health and advertising and creative testing while Toluna Start Qual offers a variety of activities such as digital diaries, discussions and live video to help you dig deeper into consumer motivations, behaviors and experiences.

For studies of all shapes and sizes, you'll be able to survey respondents from our global panel of over 43 million consumers in 70+ markets and access reporting dashboards with insights and recommendations. Launch your study in just minutes and see results populate in real-time.

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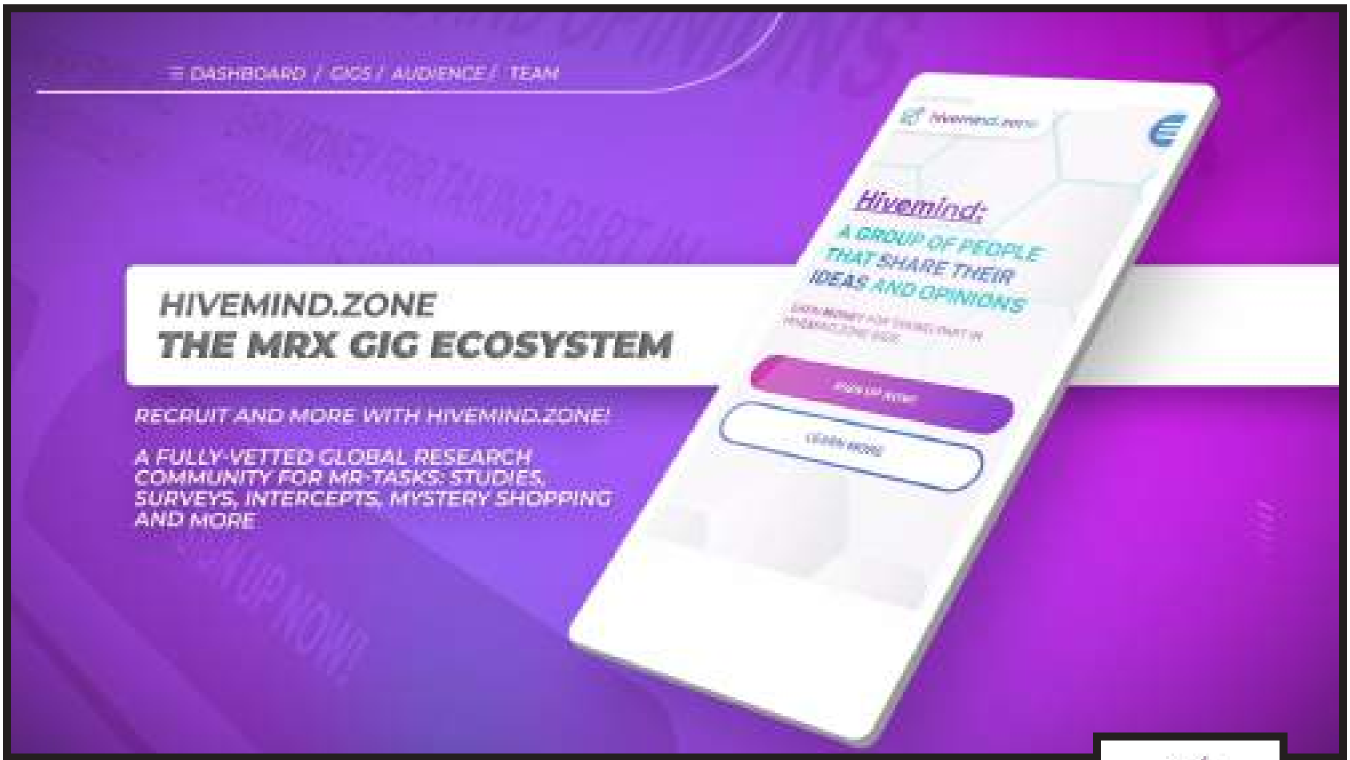
tolunacorporate.com/lp/quirks-insights-platform



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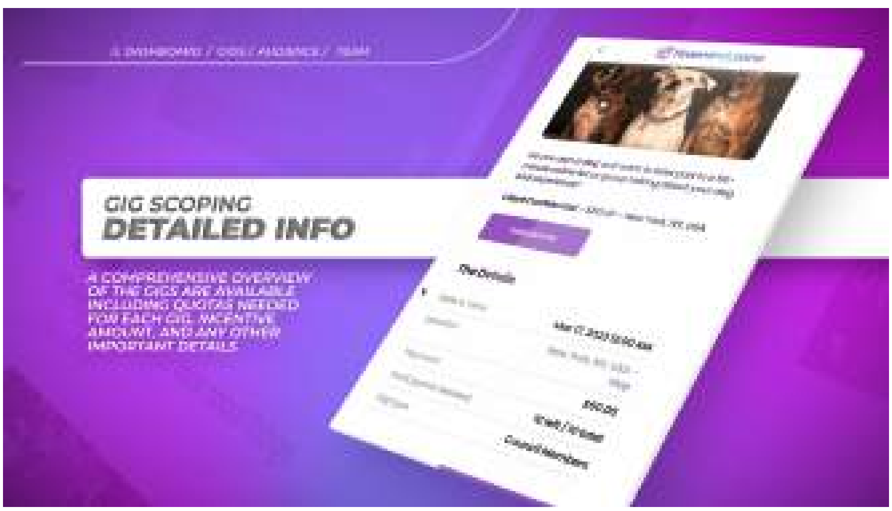

Community Platform

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People want to be heard, not studied. That's why the future of insights is conversational.

Conversational research is about letting people express how they truly feel in the moments that matter most. It's texts, emojis and selfies. It's deeper insights through quant, qual and video in one seamless experience.

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harkconnect.com

Cxoice: The end-to-end insight platform for CX

DOBNEY.COM

Cxoice Insight Systems delivers an integrated end-to-end platform for collecting and collating research and insights, at scale, at speed.

Developed over 20 years for in-house use by dobney.com, Cxoice streamlines all aspects of insight creation, collation and dissemination.

Whether for web, phone or offline survey research, Cxoice's Questionnaire Editor makes it easy to build, share and test questionnaires. With no log-in needed, anyone can design directly on screen, without needing to go from Microsoft Word to scripting.

For web surveys, use panel links or e-mail invites, or for CATI or WATI data collection, add sample and allocate it to telephone interviewers working in-house or remotely using a time zone-aware appointment manager with quotas and monitoring tools.

Data analysis is a breeze with live counts, automated tabulations and a live data presentation that is easily customized via the Report Editor or easily exported to Excel or PowerPoint.

With its built-in project manager structure, Cxoice can also be used for collation and sharing of assets from surveys or other market intelligence with controlled, permission-based access, alerts and knowledge sharing across the business.

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www.dobney.com

IN FOCUS

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

// Survey Monitor

••• small business research

You take the good with the bad

Women business owners detail their highs and lows

2022 proved to be a stressful year for female entrepreneurs. According to Office Depot's 2023 Women's Small Business Survey, over half (63%) of those who opened their business prior to 2022 said the past year was the most challenging for their business, with one in six feeling stressed daily.

Twenty-three percent of respondents are experiencing concerns with fatigue and 13% are struggling to find employees. Thirty-five percent of small business owners say they employ their family members while 19% indicate it is against their philosophy to employ members of their family. Thirty-five percent say they would benefit from having marketing materials, access to office supplies (25%) and networking tools or platforms (34%).

Fifty-six percent of female business owners say there are highs and lows when running a company and 52% say it takes extensive time and effort to reach success. Forty-three percent of owners emphasize the importance of making connections and 42% advise other business owners to prepare for unexpected hurdles. Some say it is challenging to always be on the clock and to figure out how to balance tasks and distractions. Others say they struggle with the lack of co-worker camaraderie, not being amongst other people and not having a proper workspace with enough storage for business necessities.

More than half (55%) of women surveyed reported that they run their businesses primarily from home. Many have made substantial investments in creating a dedicated at-home workspace, with one in five claiming they have invested more than $5,000 of their own money for work-from-home equipment and tools to help run their business. This includes purchases like laptops (36%), printers (35%) and software programs (24%).

Despite facing myriad challenges, 70% of women say they enjoy being their own boss and 73% say their work-life balance has improved since opening their own business. Over the next year, small business owners aim to grow their profit (59%), gain more customers (53%) and expand their business (28%).

OnePoll conducted this survey of 1,000 female small business owners from February 1-6, 2023, on behalf of Office Depot.

••• shopper insights

Long COVID, grocery store-style

Traditional grocers still affected by changing shopper habits

Traditional grocery stores are losing their dominance as shoppers continue to choose the hybrid and digital options that were popularized

INTRODUCING THE WORLD'S FIRST
PRODUCT CONSUMPTION INTELLIGENCE PLATFORM™

Product Consumption Intelligence is a radically new, technology-driven approach to measuring product consumption behavior. It precisely captures every usage occasion—down to the SKU, gram, and second—in real time. And it's done without ever asking a single question.

USAGE OVERVIEW

Capture consumption behavior throughout the home for any CPG product, including household goods, food and beverages, wine and spirits, beauty, and more.

TECHNOLOGY OVERVIEW

The Product Consumption Intelligence Platform combines hardware and software that CPG insight and innovation leaders can use to passively measure consumption where and as it happens.

HARDWARE

Powered by always-on, cloud-connected coasters, the platform allows study participants to simply go about their lives, while the autonomous devices capture what, when, where and how much was used.

QualSights ships hardware directly to participants, along with instructions on how to set up the devices.

SOFTWARE

Product Consumption Intelligence data is displayed on a comprehensive set of dashboards. A variety of views are available to study leaders, from the habits and usage patterns of individual study participants to data rollups, trended data, and summary charts over days, weeks, months, and even years.

To start the discussion on how you can implement the Product Consumption Intelligence Platform™ within your next study, reach out to **our sales team sales@qualsights.com** during COVID-19, with many consumers finding them to be easier and more convenient. According to PYMNTS, a payments and commerce platform, post-pandemic, only 44% of shoppers on average are visiting brick-and-mortar grocery stores, compared to 63% in early 2020.

Before the pandemic, 75% of Baby Boomers and seniors, 65% of Generation X, 51% of Bridge Millennials and 47% of Millennials only made purchases at physical stores. Fifty-eight percent of Gen Z and 53% of Millennials were more likely to shop both in-store and online. Post-pandemic, 72% of Baby Boomers and seniors, 57% of Gen X, 38% of Bridge Millennials and 36% of Millennials purchased grocery items in-person only. Gen Z stayed the same post- and pre-pandemic (41%) but 6% exclusively shopped online after COVID-19.

Thirty-seven percent of respondents say they have made no in-store purchases, 19% made half or less than half of their purchases in physical stores and 44% say they bought more than half of their items in-person. The items purchased in-person more than half the time include fresh fruits or vegetables (53%), fresh meat, chicken or fish (54%), frozen food (50%), packaged items (48%), cooking supplies (47%), canned goods (49%) and condiments and spices (49%). The items that are most commonly purchased online include pet supplies (55%), baby items (50%), personal and health care items (48%), paper products (46%) and cleaning supplies (45%).

Shoppers are influenced by many factors when deciding which method to shop. Thirty-six percent say they are most influenced by the convenience of online options and 32% point to higher in-store prices and a lack of deals and benefits as factors driving them away from traditional stores.

Thirty-one percent of Baby Boomers and seniors, 35% of Gen X, 44% of Bridge Millennials, 43% of Millennials and 45% of Gen Z say a key factor for switching from physical stores is convenience. Fifteen percent of Baby Boomers and seniors, Millennials and Gen Z say traditional stores have a smaller selection of products and less brand variety. Thirty-eight percent of Baby Boomers and seniors, 36% of Gen X, 27% of Bridge Millennials, 24% of Millennials and 14% of Gen Z say there are more deals and lower prices outside of grocery stores. While fear of getting sick is still prevalent, it is no longer the No. 1 reason to avoid in-person shopping with only 6% of Baby Boomers and seniors, 7% of Gen X and 7% of Millennials citing it as a reason to purchase fewer products from grocery stores.

The PYMNTS Changes in Grocery Shopping Habits and Perceptions study surveyed 2,426 U.S. consumers from December 22-25, 2022.

••• shopper insights

Trust, communication are key

Etsy customers detail their expectations

Trust in an Etsy product listing is a significant deciding factor for both frequent and infrequent shoppers. The Etsy SEO site eRank found that accurate photos, clear communication and reliable sellers increase customer trust when making a purchase.

Eighty-two percent of respondents say that photos are a must when browsing a product. Sixty-eight percent say that the images should be accurate representations of the items listed. While photos are important features in a listing, 81% say that clear and direct product descriptions are also needed. Shoppers prefer descriptions that detail the product and its dimensions, materials or any other important features.

Many shoppers rely not only on photos and item descriptions but also on a store's reviews and ratings. Sixty-nine percent say that a seller's rating is considered when making a purchase and 81% say they take positive product reviews from other shoppers into account.

While Etsy sellers have little to no control over the shipping process or potential delays, shoppers are appreciative of their communication efforts when delivery issues happen. Eighty-four percent of buyers say they enjoy being notified when their items ship, giving them an estimate of when their package is expected to arrive. Twenty-one percent also say they are more likely to shop again if a seller is responsive throughout the shopping processes.

Many Etsy shops offer customizable items which shoppers often purchase as birthday gifts. Fifty-three percent of respondents say they have used the service to purchase items for birthdays and 91% say it is a go-to spot for unique birthday presents.

Shoppers say they are likely to purchase another item from a seller if they receive a high-quality product (67%), free (45%) or fast shipping (30%), if a coupon code is offered (13%) and if the packaging is nice (8%) and includes free items (8%) or a personal note (7%).

While some use Etsy for specific occasions and celebrations, many use it frequently for household products or personal items. Forty-one percent of Etsy shoppers fall above the U.S. median household income with only 9% of shoppers in the $20,000 or less income range. The majority of customers (27%) fall into the $20,000-$49,000 range, 22% make $50,000-$74,999, 17% are in the $75,000-$99,999 range and 24% make $100,000 or more.

eRank's Etsy Buying Habits report surveyed 1,000 recent Etsy shoppers in November 2022.

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

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

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

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

#facetofacemrx

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

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

••• consumer insights

What happened to good-old 15 percent?

Survey finds 'tip-flation' getting out of hand

Tipping is expected when going out but "tip-flation" has led many to question why they should tip for everyday purchases. According to Angus Reid Institute, a Canadian nonprofit focused on independent research, 64% of Canadians say they have been prompted to tip more often and 62% have found themselves being asked to tip higher percentages.

Twenty-eight percent say the amount they have been encouraged to tip has remained the same. Twenty-eight percent of respondents also say the number of times they have been asked to tip has stayed the same while only 4% say it has decreased. Eighty-three percent say too many places are asking customers to tip and only 13% say customer service has improved in recent years while 71% strongly disagree and disagree that it has gotten better.

"Tip-flation" may be attributed to the introduction of point-of-sale machines that offer pre-set percentage options. Payment machines often show higher percentages than the universally understood 15%, now offering customers tip options up to 30%.

While tipping is not a new concept, 78% say it no longer serves its original purpose. Seventy-three percent say that instead of a tip being a form of appreciation for a good service experience, it has become an excuse for employers to underpay staff.

The expectation to tip higher amounts has led many to forgo outings where tipping is expected. Forty-nine percent of 18-34-year-olds, 48% of 35-54-year-olds and 31% of people over 55 say they go out less to avoid the extra tipping costs. Thirty-two percent say they are OK with the current tipping system but 59% prefer the idea of a "service included" experience that would eliminate tipping and replace it with higher base wages for employees.

When reflecting on previous dining experiences, 52% of 18-34-year-olds, 51% of 35-54-year-olds and 54% of those over 55 say they tipped 15% to 19%. Fourteen percent of 18-35-year-olds, 22% of 35-54-year-olds and 24% of people over 55 say they tipped 20% or higher. While tipping at a full-service restaurant is more universally accepted, many respondents question which services should receive a tip.

While at a coffee shop, 21% of 18-34-year-olds, 25% of 35-54-year-olds and 38% of people over 55 almost always tip, yet 63% of respondents say that tipping should not be required while 24% say tips should be 14% or less. Eighty percent of women and 72% of men say they tip their hairdresser or barber but 40% of respondents say tips shouldn't be required while 30% say a standard amount for those services should be 14% or less. Fifty-three percent say tipping is not necessary for taxi and Uber drivers and 42% say the same about food delivery drivers while 39% say delivery drivers should receive a tip of 14% or less and 14% say taxi and Uber drivers should be tipped 15% to 19%.

The Angus Reid Institute conducted this survey with 1,610 Canadian adults who are members of the Angus Reid Forum on January 31-February 2, 2023.

••• health care research

Rx for MDs: find a new vocation

Health care professionals fight burnout

Despite extensive efforts to address physician burnout and enhance doctors' well-being, new data show that U.S. physicians report significantly more work-related stress and burnout in late 2022 than just a year before. According to InCrowd, a data and insights provider for the health care and life science industries, 30% of U.S. physicians in late 2022 say they feel burned out, up from 23% the year before.

Fifty-five percent of doctors say they know at least one colleague who is leaving or has left clinical care, up from 41% in 2021 and nearly 30% say they have considered leaving their clinical care profession in the last six months, up from 20% in 2021. At the same time, physician confidence in public health has plummeted. Only 6% of U.S. doctors say they feel optimistic about the state of public health in the U.S., down from 17% in 2021.

Respondents paint a sobering picture of their attitudes toward their professions with 70% saying they feel frustrated by the pressure on health care professionals in today's world, up from 47% in 2021. Thirty percent say they find their profession rewarding, down from 45% in 2021. One in four say they feel appreciated for their work, down from 39% in 2021 and only 16% would encourage their child or a member of their family to pursue their career, compared to 30% in 2021.

A third of physicians (32%) say their mental health has suffered over the past 18 months, up slightly from 30%

in 2021. Many doctors suggest facilities address burnout by increasing support staff for nurses, medical assistants and admins, reducing patient volumes and enforcing mandatory vacation time or half days.

Only 10% of respondents feel their medical facility effectively addresses staff member burnout and 16% say their medical specialty helps. Respondents offered some verbatims on the topic. "I think the whole system needs to be overhauled," said a cardiologist from Georgia. Stressors also include inadequate staffing and non-clinical care demands. "[My] organization claims to prioritize well-being; however, it does not take actions to streamline administrative demands on time, does not arrange for appropriate staffing to prevent working overtime to cover clinical duties and has been ineffective in staff retention, which leads to further dissatisfaction," said a Connecticut surgeon.

Doctors say they cope with work-related stress by exercising, spending time with family and friends and meditation – responses that are consistent across both 2022 and 2021.

The InCrowd U.S. Physician Feelings on Burnout 2022 report includes data from 500 physicians of various specialties. The survey was fielded between November 18-December 7, 2022.

••• employee research

Shifting roles

CMOs ride wave of new trends and technologies

CMOs are prioritizing new technologies and immediacy instead of long-term brand-building amidst business growth difficulty. According to executives-as-a-service firm Chief Outsiders, CMOs are optimistic about AI developments and are relying on machine learning, including ChatGPT for customer targeting and behavior modeling.

Respondents indicated that ChatGPT and other AI-powered products would be useful for content creation and management. CMOs say market research and competitive insights, strategy development and planning, digital marketing, customer service and marketing technology strategy, adoption and use will also find value in generative AI applications.

Other findings and insights from CEOs and C-suite employees include:

AI and machine learning will be revolutionary. AI and machine learning will be game-changing technology in 2023 and it will have the most impact on marketing in the areas of customer targeting and modeling customer behavior.

The economy is a headwind to growth. Eighty-four percent of CMOs believe the economic and business climate of the next 12 months will negatively impact business goals with only 7% saying there may be a slight positive impact. The economic climate will hamper the ability to meet performance expectations, with respondents citing inflation, talent and labor issues, rising interest rates and supply chain issues.

Sales and marketing are misaligned. CMOs believe poorly defined strategy and corporate culture are the most likely causes of misaligned sales and marketing. Still, they believe that the relationship between sales and marketing has improved as companies rely on digital channels for demand generation.

The CMO's role is changing. Seventy-four percent of CMOs believe there has been a shift in the past 12 months in the role CMOs are expected to play in driving growth. The majority of CMOs believe there is more emphasis on immediate sales, less long-term thinking and more short-term thinking. Most CMOs believe this shift is driven by changing customer behavior and increased competition. Seventy-five percent of CMOs believe this shift in how CEOs view CMOs as growth drivers is permanent.

There is an improved perception of CMOs. Seventy-three percent of CMOs believe they are viewed more positively by CEOs than in previous years.

Market research is driving growth. CMOs believe that market research and competitive insights, strategy development and planning and digital marketing will be the most significant driving factors in delivering growth.

Growth is trumping other priorities. The majority of CMOs selected "setting the growth agenda" as the highest priority for C-suite/private equity in 2023.

Customer experience is a competitive advantage. CMOs believe that creating a best-in-class customer experience is a significant competitive advantage.

Video is popular on social media. Most CMOs believe that customers want to be communicated with over social media platforms through video. Most of them will make video content production a priority in 2023.

LinkedIn and Instagram are the most popular social media platforms. CMOs cited LinkedIn as their likely predominant social platform for B2B and Instagram for B2C influencer campaigns in 2023.

Direct-to-consumer (DTC) sales in retail will rise. CMOs believe either retail or health care will significantly increase DTC sales in 2023.

Gen Z cares about environmental, social and governance (ESG) strategies. Most CMOs surveyed believe Gen Z is the most concerned about a brand's stance on ESG when considering buying.

Chief Outsiders conducted its 2023 CMO survey with 80 CMOs in December 2022. It included a ChatGPT question in February 2023 which was answered by 45 CMOs.

••• special advertising section

22 TOP HEALTH CARE RESEARCH COMPANIES

Conducting health care research may be complicated due to the sensitivity of the data and the insights gathered. Applying research findings has immediate consequences for health care practitioners, patients, caregivers and many others.

Companies specializing in health care research can offer the most effective and efficient research methods. They are familiar with the challenges in this sector and can ensure you remain compliant with information privacy regulations. If you need insights on patients, physicians or medical devices these companies can collaborate with you from start to finish to obtain high-quality findings.

AplusA

Founded 1990 | 160 employees
Kevin M. Kelly, COO and Head of APLUSA U.S.

AplusA is a physician-led, global health care market research consultancy with offices throughout Europe and the United States. AplusA's U.S. affiliate, headquartered in the New York metro area, combines AplusA's pioneering expertise in global real-world patient data with advanced analytics and strategic qualitative acumen to offer approaches that predict physician and market behavior. We focus on our clients' strategic research needs such as demand forecasting, segmentation and uncovering new business opportunities through our innovative Pharma Discovery Suite™. AplusA's U.S. business is designed to meet the unique needs of U.S.-based biopharmaceutical and medical device customers for both domestic and global insights-driven decision-making.

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Applied Marketing Science (AMS)

Founded 1989 | 40 employees
John Mitchell, President and Managing Principal

Applied Marketing Science (AMS) is a Boston-based full-service market research consulting firm. With roots in the MIT Sloan School, our expertise in medical products and health care comes from over 30 years of providing high-quality market research for the world's best-known health care companies. They trust our expertise because we deliver actionable insights – and we can do the same for your company. From medical devices and diagnostics to pharmaceuticals and health care delivery, our team has advised innovators in nearly every clinical specialty. Let us help you better understand clinicians, administrators, payors and patients for improved patient outcomes, more satisfied providers and better financial returns.

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Annie McDannald, Global Vice President, Marketing Research Services

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Clarity Pharma Research® LLC

Founded 2008 | fewer than 100 employees
Susan Carroll, Managing Director

Clarity Pharma Research brings clarity to clients' business decisions via nationally representative, real-world research on pharmaceutical products, from pre-launch to patent expiration. We integrate anonymized patient records/treating physician research with national and other big data to size markets (epidemiology), measure product usage, enhance forecasting, describe treatment patterns, gauge clinical utility and fill gaps in secondary data. We find out the why behind physicians' treatment decisions through perceptual and empirical questions about real – not hypothetical – patients. The FDA has accepted our findings to modify a client's clinical trial and our scientists boast more than 100 medical journal articles and conference presentations. SBA-certified Woman Owned Small Business (WOSB).

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www.claritypharma.com

Decision Analyst Inc.

Founded 1978 | 150 employees
Monisha Hatfield, Senior Vice President
Bonnie Janzen, Executive Vice President

The Medical Research Group at Decision Analyst specializes in qualitative investigations, strategic survey research, advanced analytics and consulting services for the pharmaceutical, medical, health and wellness industries. This team of medical research specialists has the experience to solve difficult marketing problems. Their scientific and technical backgrounds ensure they understand the complex issues in the medical industry. Much of their work among patients and HCPs is strategic, multiphase and often multicountry. Decision Analyst specializes in strategy research, market segmentation, new product concept testing and forecasting, messaging optimization, innovation services and advertising research. Our researchers will recommend the quantitative or qualitative technique best suited to your research needs. We design and execute marketing research and consulting assignments in North America, Europe, Latin America, Australia, the Middle East and Asia.

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www.decisionanalyst.com/industry/medical

Egg Strategy

Founded 2005 | 50 employees
Christopher Wilshire, CEO and Founder
Matthew Singer, President

Egg helps health care providers uncover foundational, empathy-driven insights and apply them to help brands grow and transform. Whether you are new to a category or looking to find relevance in the face of new competition, we help you unpack what matters most to HCPs, patients, consumers and care partners, leveraging that understanding to set the strategic direction for your brand. We excel in illuminating patient journeys, finding points of critical connection across care teams, pre-launch planning, master brand and portfolio strategy, including positioning across multiple indications, segmentation and creative/message development. Our experience spans pharmaceutical, life sciences and OTC brands and includes the following categories: respiratory, oncology, cardiovascular, diabetes, immunotherapy, neurology, dermatology/skin care, ophthalmology, infectious disease, gastroenterology/digestive health, pain, wellness, oral care and several rare and ultra-rare diseases.

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Fieldwork

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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 multi-country project execution. Fieldwork is your qualitative research partner. Focus on the research. We'll do the rest!

Phone 1-800-863-4353
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Focus Insite

Founded 2015 | 40 employees
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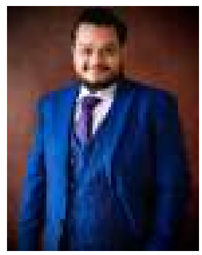

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M&Ms not included: making the most of virtual qual

| By Sarah Faulkner

snapshot

Sarah Faulkner offers tips on prepping both participants and observers for success.

As we've adapted to the many changes in market research wrought by the pandemic, virtual qualitative research has become even more of a staple in the insights professional's toolbox. But while these online approaches provide many benefits, they can also come with significant pitfalls. Here we'll review the advantages of virtual qualitative research as well as common challenges, along with tips to mitigate them.

Key advantages of virtual qual

Eliminates location constraints. Conducting qualitative research virtually means connecting with people without having to travel to their locations, saving considerable time and money. It also allows recruiting across cities and regions to boost geographic diversity or compare key locations.

Recruiting benefits. Because consumers can be recruited from multiple cities, recruiting low-incidence or hard-to-find participants becomes easier, given the larger potential pool of prospects. Virtual interviews can also increase the likelihood of recruiting busy executives, physicians or high-net-worth individuals who might not be willing to come to a facility (or have researchers in their homes or workplaces).

Allows more client team members to engage. Many more client team members can view the research in real time without the limitations of travel budgets, time out of the office and back room/in-home space. Team members can also join as their schedule allows or quickly access digital recordings.

A range of digital tools. Thanks to virtual interview platforms, moderators have unique tools to enhance the experience for participants and more easily capture some types of responses. There are virtual whiteboards, on-screen markup tools for concepts and ads, polling questions and more. Plus, client viewers can send probes/follow-up questions to the moderator via private chat to minimize disruptions.

Key challenges of virtual qual

Quality of team engagement. While virtual qual allows a greater number of team members to engage, the quality of that engagement can suffer without the team being physically present for the research. If someone is investing time and money to attend physical research, they are more likely to focus their attention on viewing the interviews/groups and actively participating in the debrief. Even with the best intentions, blowing off virtual groups is much easier and more likely to happen. Or, perhaps even worse, paying partial attention to groups on a screen while trying to multitask.

Tips to overcome this challenge:

- Book a conference room during the research times with livestream viewing and ask people to block their calendars to replicate the backroom experience as closely as possible.
- Bring in snacks and meals for fuel (and as an attendance incentive) and assign someone to lead mini-debriefs after each group/interview, capturing notes in the room on a whiteboard


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or flipchart (as well as a full debrief after all the interviews).

- If the groups are happening too early or late for practical livestream viewing, reserve a room and calendars for a time the following business day instead.
- If the online qualitative research is asynchronous (e.g., bulletin boards, digital diaries), reserving team time and a central space for review and debriefing during the project is also a valuable approach for driving team engagement.
- If the team works virtually/across multiple sites and it isn't practical to have a physical viewing session, schedule virtual debrief calls at the end of each research day to encourage people to actively view the groups in real time.

Quality of participant engagement. This challenge typically comes in one of two forms: technical issues or distraction. There are myriad potential technical challenges with online qualitative research, including poor video or audio quality, slow connection speed, access trouble, user error and more. When connecting from home, distraction can also be a real issue, whether it be kids or other family members interrupting or making noise, dogs barking, the temptation to multitask, etc.

Tips to overcome this challenge:

- Include technical qualification questions and requirements in the screener. Make sure potential participants have the right equipment, expertise and expectations before qualifying. Some areas for questioning you might consider adding include: participant access to high-speed internet; equipment owned/used (e.g., laptop, tablet, smartphone, webcam); comfort/experience with technology/platform; willingness to be recorded or submit video/pictures, etc.
- After qualifying, in the research invitation, tell participants that they need to participate from a private, well-lit room with minimal distractions. Ask them to log onto the video platform a few minutes early to test their audio and video.
- Ensure your research supplier or platform vendor provides live technical assistance and troubleshooting. They can help participants test everything in advance and provide any assistance needed in the background without disrupting the group.
- When the participants are online, before the group starts, either the moderator or a project manager should also take the opportunity to address any potential issues upfront with individual participants. For example: turn lights on, contain the barking dog, get closer to the microphone, get closer to the camera, etc.

Maximize the value

Online qualitative research is a wonderful addition to the portfolio of consumer research tools and techniques and has many valuable applications. Knowing when to use online qual, and how to avoid potential pitfalls, will ensure you and your team can maximize the value of every engagement.

Sarah Faulkner is owner of Faulkner Insights. She can be reached at sarah@faulknerinsights.com.

Creating a buzz

How research helped develop the go-to-market strategy for a new cold brew coffee

By Elliot Savitzky and Hannah Robbins

Spruce Haven Farms (SHF) is a fourth-generation family farm and one of the largest farms in Upstate New York. Milk from its 2,000+ cows supplies some of the top brands in today's competitive yogurt market. The family spent 20 years working on nutritional science to create a way to make cow feed that could improve the nutritional benefits of their cows' milk, with the end goal of enhancing people's wellness and nutrition.

snapshot

In the first part of a two-part case study, the authors detail the initial steps of launching Spruce Cowffee.

They entered a partnership with Finca Dos Marias, a coffee farm in Guatemala, and came up with the idea for a better-for-you cold brew coffee. SHF selected the whimsical name Cowffee based on input from friends and family. Given the founder and his stakeholders' demographics (ages 60+) SHF felt that since Baby Boomers really need better nutrition and Baby Boomers are crazy about coffee, why wouldn't Cowffee be a great idea? Spruce Haven would combine its healthy and nutritious milk with this coffee and Baby Boomers would love it.

Well, it didn't quite work out as planned and we'll shortly see why.

Conduct the proper research

Research companies like TRC Market Research (TRC) often get calls from founders of small start-ups and entrepreneurs looking for help in furthering their cause. There are usually four things they all have in common: they have a quality product or service they are looking to sell; they do not have the skill set to take the product or service to market successfully; they are most often unwilling to change the way they are thinking about their business; and lastly, they don't have the resources to conduct the proper research to develop that go-to-market (GTM) strategy. They also don't know what they don't know and they're not even sure they need to know it.

Such was the case here. When we met with the assembled team (including SHF's founder, board of directors, marketing and sales team and a package designer) it became clear that scaling and launching the brand nationally would be a challenge.

Internal stakeholders each had entirely different opinions about what the product was, what its name should be, who the target consumer was and what the packaging should look like. There was no proof of concept for the brand positioning, no list of reasons to believe in the product, no identified target audience and no retail strategy. There were no professional insights and research to establish a revenue-based GTM strategy.

The client had made assumptions about specific marketing components for the brand, not based on any research but based solely on their opinions. Even if they had guessed right, they still did nothing to confirm their assumptions.

As it turned out, they had targeted incorrectly (Baby Boomers), landed on a name that did not resonate with consumers (Cowffee) and decided that the most important benefit to talk about was an ingredient no one understood.

Differentiate the product

Based on years of experience helping companies develop products and create positionings for them, we knew we had to turn to marketing research to understand who to target and how best to differentiate the product in the market.

The first step was determining the core brand values that resonate with the high-value target audience. Every great brand starts with a strong foundation. In today's marketplace, that means that a new brand needs to be even more transparent and authentic, especially given the societal rise in and awareness of misinformation.

Let's look at where we started. The graphic in Figure 1 (next page) shows the four quadrants of Spruce Haven Farm's mission. It was created based on SHF's philosophy and could be used to help guide the launch of any of its products. What made the cold brew coffee product so exciting was that it was the first of its kind: There was no similar offering on the market that helps boost your immune system, has 22 grams of protein and is lactose-free.

The product delivers a veritable cornucopia of additional benefits: delicious, no sugar aftertaste, no sugar buzz, low in sugar, high in protein, clean-label. It is also shelf-stable and can be merchandised in multiple places – either in a beverage cooler or in the coffee section, which is a positive but is also challenging at the same time.

Another potential selling point is the high level of an immunity-boosting ingredient called conjugated linoleic acid (CLA) that Spruce Haven Farm had been working on for 20 years. The increased level of CLA in the milk was a direct outgrowth of the farm's efforts to improve the nutritional benefits of the feed that is grown for its cows. As this launch was being formulated during the pandemic and its attendant focus on health and health care, there was a merging of unusual times and ex-

FIGURE 1

FIGURE 2

ceptional people working for a wonderful purpose (Figure 2).

Creating a value proposition from scratch

We knew that with no preconceived, consistent value proposition, a sound commercial strategy would have to be established. The original value prop was all about CLA, about fighting disease, about immunity, about cows and Guatemala. In other words, it was all over the place. So we had to create a clear focal point. But that's okay, because whether you work for a giant CPG company or an emerging brand with no money, you still need a commercial strategy that works.

The challenge we faced was, essentially, how to come up with a GTM strategy that leveraged an effective value proposition. The value prop needed to incorporate a package that concisely communicated the key benefits and appeal to the most appropriate key target market, with a name that works and a message that clearly and positively differentiates it from the competition.

The brand name, although meaningful to the current stakeholders, had not been tested among a relevant audience. The package (Figure 3) featured the term CLA, which is an advantage for the product but not something with which the mainstream consumer is familiar. Underestimating the inherent value of on-trend packaging is a mistake when it is such a critical component of any brand. The brikpak packaging typically used for shelf-stable beverages is nearly 60 years old, creating an opportunity to update the packaging structure as well as the graphics.

We first had to develop a hypothesis for who would be the product's most appropriate consumer. We had the consumer originally targeted by the client – the Baby Boomer – but nobody had worked out which sector of the market would generate the greatest revenue from sales. Was it Gen Z? Gen X? Millennials?

Secondary data indicated that the more appropriate target for this new drink was likely to be the younger generations. From what we found, roughly half of the Gen Z and Millennial population either purchased iced coffee in the previous month and/or drank gourmet coffees daily.

And there is no doubt that the last few years were a defining time in all our lives. Faced with extreme measures being taken all around us because of the COVID-19 pandemic, Gen Z and Millennial consumers gravitated towards products that were better or good for them and aligned with brands that supported these new lifestyle trends.

Spruce Haven Farms, therefore, was in the perfect position to provide a solution that these two generations were inclined to adopt. A "boost to immunity" message was the perfect fit for consumers with a desire to improve their health from an attitudinal, behavioral and health profile perspective.

Spoke to the target market

We felt confident about who was going to benefit most from this product but before we embarked on a large-scale research project, we needed to create a new package structure and design for the product, one that spoke to the target market and which instantly conveyed key benefits.

Working with a world-class CPG designer, the marketing team produced a multitude of high-potential packaging alternatives, with various treatments for the colors, the names and the hierarchy of communication of benefits. This allowed us to determine what would work best with the target group rather than simply guessing.

We were given 24 potential package design concepts to work with (Figure 4). Notice the different brand names, from the current Cowffee to Spruce Haven to simply Spruce. Many combinations of color, version of cows, immunity benefit, coffee, milk, cold brew and other aspects. One of our challenges was

FIGURE 3

FIGURE 4

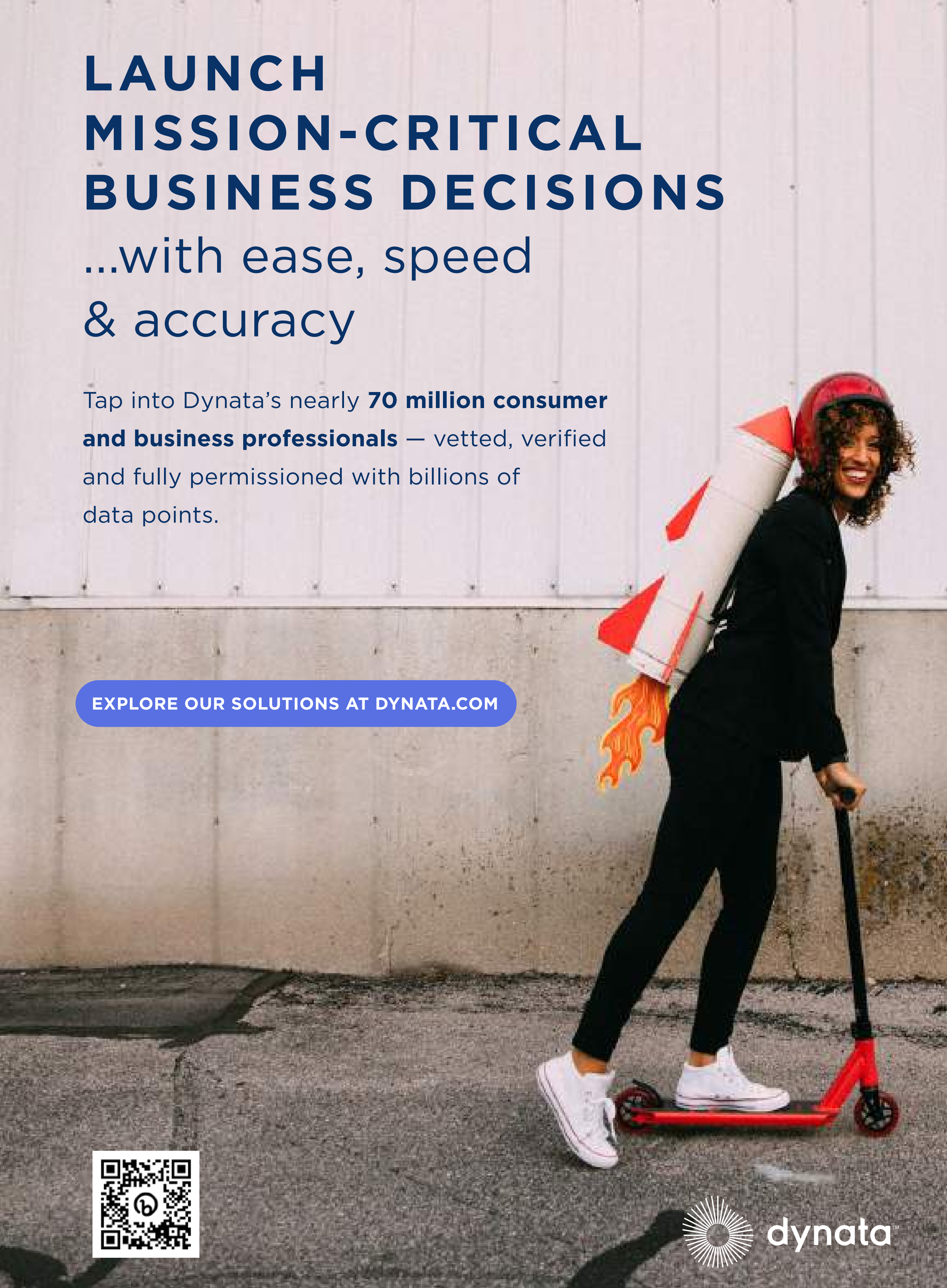
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FIGURE 5

a stakeholder bias that clouded their ability to see the value in testing new designs, especially ones that differed so greatly from their original one.

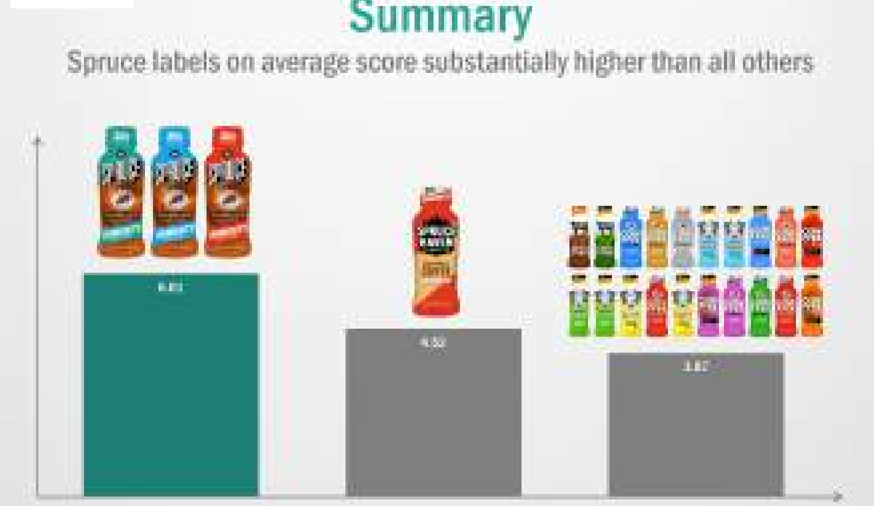
The question then became, how do we sort through all these options to select what will work best with the target market we are interested in? We needed a way to identify the top designs that would resonate with a revenue-driving target market.

We turned to a TRC product called Bracket, named after its tournament-style approach to competitively pairing alternatives until you find an outright winner. Through a series of random pairings of the 24 packages, we quickly determined which were most appealing by testing them among a sample of over 2,000 Gen Z and Millennials.

And as you can see in Figure 5, we laid out the best-performing and worst-performing package alternatives on an array that was easy to view and easy to understand. From left to right, the different packages are displayed in terms of their importance, from most to least. Notice that there are five packages that have been separated from the rest of the pack on the left, with two of them ranking significantly higher than the other three. Both were named Spruce and in fact three of the top four had the name Spruce, with the only difference being the colors of the packaging.

Spruce was ranked almost twice as high as the Cowffee alternatives, with Spruce Haven somewhere in between (Figure 6). As an aside, we did find that the larger the font for the name Cowffee, the poorer the package performed – which is not something we would have predicted. Clearly, this target group of Gen Z and Millennials have their preferences for what this product should have been called, proving the importance of conducting research and illustrating the importance of eliminating personal bias in steering the business in the right direction for success.

FIGURE 6



A path forward

Now that we had identified a path to move forward, with an alternative target group, a new package and a preferred name, we needed to confirm the appeal and to create a leverageable positioning for the brand. In part two next issue, we will describe the step-by-step process of applying research techniques to create the positioning for this new brand and gear it up for success.

Elliot Savitzky is senior vice president at TRC Market Research. He can be reached at esavitzky@trcmarketresearch.com. Hannah Robbins served as fractional CMO for Spruce Haven Farms at the time of the project profiled in this article. She can be reached at hannahrobbins13@gmail.com.

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Strategize to optimize

Navigating digital direct-to-consumer and subscription consumer journeys

| By Brady Silva, Julia Murphy, Laurie Gaby and Mike Mabey

snapshot

Research informs a digital journey framework and the go-to-market strategies needed to win in the D2C and subscription space.

Four thousand years ago in ancient Mesopotamia, someone etched symbols into a clay tablet. This is now considered the world's oldest form of writing. After hundreds of years spent deciphering the text, archaeologists were finally able to understand the writing. Perhaps they expected a poem, a fable or a short story. Instead, they uncovered the world's first shopping list.

This shopping list tells us something vital about people: the habit of making a list, heading down to a store, picking up products, paying and heading home is thousands of years old – as old as writing itself.

In recent years, however, shopping habits have shifted dramatically. People shop without even leaving their homes, at times even skipping ad hoc shopping altogether by subscribing for automatic delivery. As normal as this may seem to us now, it's inarguably representative of a tectonic shift in human behavior – one that merits further exploration.

As students of consumer decision behavior (and frankly as geeks in behavior), we wanted to dig in and understand these changing consumer habits and their impact on how brands optimize their interactions with

their target audiences. So we talked to 22,000 digital services and tangible goods subscribers in nine countries, across four continents.

Our research gave us new insights into, and appreciation for, the differences that digital journeys bring to the traditional journey mind-set. These journeys are exemplified by the explosive growth in digital commerce, direct-to-consumer (D2C) and subscription buying, particularly in a direct customer relationship context (Figure 1). And this behavior is enabled by the pervasive influence of mobile phones. But make no mistake, digital journeys are not just traditional journeys with a phone in hand. Consumer decision behavior itself has changed.

And as it has, businesses have also changed how they think about journeys as a strategic tool. Journeys have moved from being a component in how marketers identify where to influence a purchase to becoming the underlying construct of how to understand and influence consumer decision behavior.

As a result, businesses require a new set of go-to-market strategies to make this new framework actionable and we've identified four important strategic steps.

To ensure the digital journey framework is actionable, we have linked the consumer perspective with the business strategy, providing go-to-market strategies that correspond to each phase of the consumer journey. We use our research and experience in the digital subscription and D2C channel as the consumer archetype for discussion. However, most of the digital journey insights and the structure apply across the digital commerce landscape.

We identified five critical consumer decision stages in the digital journey framework (Figure 2). Each stage is actually a mini journey of its own. Of course, the stages overlap and interact – after all, journeys are still messy. But each stage has separate characteristics and drivers that need to be addressed. As you go through them, you will see our emphasis on triggers and barriers as an important tool for understanding journey-related decision behavior.

The five stages are: Trigger, Evaluate, Engage, Stay or Go? and I'm Back!

Clarity at each phase

The impact of digital-enabled behavior on consumer choice creates tremendous opportunities for businesses to forge closer relationships with consumers. Leveraging these opportunities requires businesses to have clarity at each phase. Arguably, the business go-to-market framework is a bigger change than the consumer side of the journey. Traditionally, the whole path-to-purchase journey and consumer targeting strategy could fall into the first component – acquire. This new structure posits that there are four clear and separate go-to-market strategies (Figure 3) and that acquire is only the beginning – and perhaps not even the most important component.

The four strategies are: Acquire, Engage, Retain, Reacquire.

Now that we have shown the two sides of the coin – consumer decision stages and brand go-to-market strategies – we will discuss the stages and strategies together to show how they fit and overlap.

Trigger | Acquire

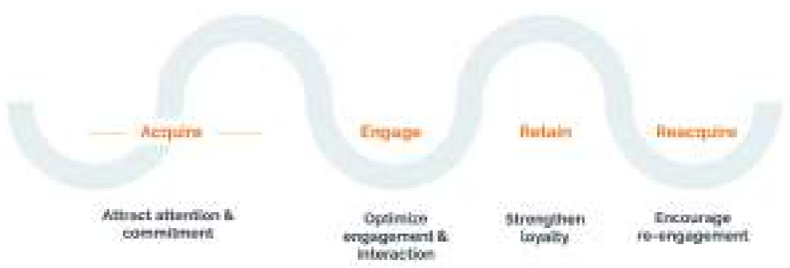
Considerations:

Consumers: What will catch their attention – introductory offers, gifting, convenience, familiarity with other D2C and subscription actions?
Brands: Ideal target audiences, identifying behaviors, how to get attention, potential touchpoints, opportunity mapping, triggers and barriers

At first glance, the trigger stage of a subscription or D2C journey may seem similar to the first stage of a traditional consumer journey. But further exploration quickly unveils clear,

Figure 3

Brand go-to-market strategies for subscription and D2C journeys



and impactful, distinctions. With a traditional consumer journey, the trigger needs to drive consumers to buy a particular product. But for a subscription or D2C journey, the trigger needs to push consumers to make a significant change of behavior. It's not just about the product – it also requires consumers to rethink how they purchase the product, whether it's in-store as they always have, online or via a subscription. Triggers need to adapt to this arguably more challenging job.

It's also worth noting the context and the environment in which the consumer makes the decision. This process only takes place online – which may make the barrier to entry higher because the brand needs to break the consumer out of their habit loops of behavior and activities.

Research exploring what drives consumers to evaluate the brand's offerings fits best in this stage. Journey modeling can help identify priority consumer clusters, conduct opportunity mapping and develop entry-point strategies. Including questions about triggers and barriers in this kind of research should provide particularly actionable findings. In our own research, we have identified that introductory offers and gifting can be powerful barrier-breakers. For digital entertainment categories, new and high-profile content can attract attention and drive signups.

Evaluate | Acquire

Considerations:

Consumers: Additional value vs. traditional channels, trust, confidence, cancellation process

Brands: Triggers and barriers to commitment decision

The primary consumer question in the Evaluate stage is, "Why commit?" In this stage, consumers seek to understand what additional value the decision provides, given the commitment it requires. While a traditional consumer journey also has an important evaluation phase, what is being evaluated in a subscription or D2C journey is vastly different. It is not just about a brand or product on a shelf but also about whether they feel comfortable with a more long-term commitment or whether they trust the online environment they are buying from. In this stage, consumers are preoccupied with key questions such as, "Do I trust the brand?" and "Will I be able to change my mind?" These questions are less prevalent in a traditional consumer journey.

For consumers considering committing to a subscription, brand trust and confidence are vital in making the decision. This is because, in the subscription decision journey, consumers are not just buying a product but a service – regardless of what brands offer. Tailoring communications with this in mind is necessary to build an effective subscription or D2C model.

Beyond that, understanding what is valuable to consumers and defining the value proposition accordingly is key to success. Whether the value is in convenience (around 70% note signing up for a tangibles subscription to "make their life easier") or in exclusive content offered by digital entertainment and fitness subscriptions, how brands message their offers is essential.

Engage

Considerations:

Customers: What do they like about the interactions and relationships? Can they try something new?

Brands: Ensuring a good user experience. What will build and solidify engagement? Are there strategies for Subscription Hoppers, Content Chasers and Try Something New customers? How easy is it for customers to modify their subscription or buying pattern?

OK, now they are customers, not consumers. The Engage stage might be the linchpin for both customers and brand. It is the place where customer lifetime value succeeds or fails. How do brands keep customers interested, engaged and paying attention once they are subscribed? It is important to look at how customers want to interact with brands and how to create a conversation that allows for the introduction of new products or services. Indeed, once acquisition is working smoothly, building a dynamic subscription or D2C model can drive further success by limiting churn and maintaining engagement.

But engagement can be a considerable challenge for businesses as they struggle to maintain the interest of Subscription Hoppers, Content Chasers and those who are always looking for something new to try. These groups, identified in our research, require intensive management from the business.

Luckily, one of the most appealing benefits of a D2C or subscription model for businesses is the ability to gather and utilize information about customers. Creating a clear process and strategy for leveraging this information can ensure success, particularly at the Engage stage. This information, alongside traditional market research, can inform the creation of new products or services, development of powerful communications campaigns and product and portfolio management. While all of these strategies can be facilitated by a digital environment – allowing for clearer measures of success and opportunities – they require a thought-out and evidence-based relationship development strategy to drive long-term engagement.

Stay or Go? | Retain

Considerations:

Customers: Provide a reason to stay, make it easy to stay and leave

Brands: What drives loyalty? Offer freedom not jail; develop "soft exits;" allow pausing

Loyalty is the question on the table at this stage. Why should customers stay? This is particularly relevant when you remember that, in a digital environment, choosing to leave is often as easy as opening your phone and pressing a button.

As with engagement, in-depth analysis of customer choices and behaviors is critical to keeping customers. But the key challenge here is to ensure that any retention strategy does not feel like a jail sentence to consumers. If they want to go, let them go: make it easy to cancel, pause or adjust subscriptions. While this may seem counterintuitive as a retention strategy, it ensures consumers feel comfortable coming back when the subscription feels relevant again in the future. Indeed, being "easy to cancel" is among the top five important benefits for tangible subscriptions and in the digital space, the proportion of consumers likely to rejoin a subscription drops to just 12% if it was difficult to cancel, compared to 46% saying they would rejoin after having an easy cancellation touchpoint. It is a long-term strategy that allows for healthier relationships with customers.

It goes beyond having a cancel button that's easy to find and click. Offering a pause or skip option can also retain customers. The element of control is important for consumers and one that is becoming an expectation of the subscription experience. By offering this, brands can demonstrate an understanding of consumer needs and acknowledge that this is normal behavior in the subscriber-brand relationship.

Exit or pause surveys can be key here; are they leaving due to product buildup, disuse or lack of new content? Measurement of these reasons can feed back into brands' Acquire and Engage strategies to improve the experience before customers arrive at the "stay or go" question.

I'm Back! | Reacquire

Considerations:

Consumers: What attracts them to come back – new touchpoints, new content, new products?

Brands: Understand why they return, identify and target serial "rejoiners"

This stage is the one that is most different in terms of consumer decision behavior and business strategy because it is a deliberate focus on reacquisition, rather than acquisition or retention. It is enabled by the digital capture of customer information through the building of direct customer relationships.

Life happens. Despite a brand's best efforts at keeping users engaged or leveraging strategies to retain them, consumers expect to be able to "flip a switch" and stop receiving – and paying for – services. But, in many cases, they will be back.

On the consumers' side, stopping a service may tie into life stages or circumstances that are temporary, such as cancelling a food service subscription because of children returning to college or planned travel. Digital entertainment providers might experience lulls in membership during the off-season of the NFL or consumers may pause or cancel a subscription based on family needs. In our research, about one-third of respondents indicated they've canceled and rejoined a digital entertainment or fitness subscription. Drivers for this rejoining behavior include content (finishing desired content or finding themselves bored by it but

rejoining when something new comes out), cost (cutting back entirely) and time (more subscriptions than they have the time for).

It's important for brands to know more about rejoining behaviors specific to their product or target audience. Understanding what paths can be taken from the moment a consumer pauses or cancels can be used to build a strategy to get them back onboard as quickly as possible. In some categories it is important to know how likely serial rejoiners are to go through the process without any incentives or price cuts. This can save a brand money, resources and marketing dollars spent on serial rejoiners.

These paths will look different based on the product or service. However, over-engaging with consumers during a pause may damage the relationship if the pause is for reasons like cost or product buildup. A communications strategy should be focused on reasons for cancellation and whether their rejoin path is open-ended or has a set time frame.

For digital entertainment and fitness subscriptions, brands have more permission to continuously market to subscribers who are not current members, as content is constantly changing. Interest-based algorithms to identify relevant content and sharing hype for the next viral show are key to win a consumer back. However, identifying serial rejoiners or behaviors behind rejoining – like a new season of a show or a certain sports season – can help direct marketing spend. If a consumer shows a regular habit of cancelling and rejoining, a few well-timed communications may go further than constant marketing. A clear understanding of the behavior is crucial to get it right.

Finally, though paths look different between physical subscriptions and digital entertainment and fitness, they are constantly influenced by each other. In sectors where subscriptions have been heavily adopted, the customer experience in one area can set expectations in another. Just like Domino's pizza tracker changed our expectations for customer transactions, expectations for subscription companies will be set by others raising the bar. A cancel or pause touchpoint may be happening for a very different reason when someone cancels their weekly food box vs. their streaming video subscription but if the process isn't easy, doesn't allow for control and isn't personalized, it can damage brand equity, trust and confidence and chances of rejoining in the future – regardless of the sector.

Next steps

Digital commerce has allowed consumers to have much more information in their journey to a decision. As a result, brands must have deeper understanding of the stages that consumers are going through in the consumer decision journey. (Figure 4 shows how intertwined and connected the digital consumer journey and brand go-to-market strategy should be.) Our discussion has focused on subscription and D2C but for consumers, the digital environment and mind-set are as pervasive as the air they breathe.

For brands, digital commerce has also been a boon. It offers brands many more opportunities to connect with consumers and to develop direct relationships. The result is the need to develop more targeted strategies to optimize each stage of the consumer connection opportunity. However, if we had to focus on one area, we would draw a box around the Engage section in Figure 4, since it is so critical to success. But the challenge is that all these connections are in a digital environment, with many moving parts and potential consumer off-ramps. As we all know, it is very easy to go down rabbit holes when we are online.

For brands to effectively optimize opportunities, they need key information about target audiences. The good news is that digital commerce provides many more opportunities to develop direct customer relationships and to leverage the first-party data that comes with those relationships.

Adapt and connect

Digital commerce presents a new set of conditions, context and consumer power. Consumer journey knowledge and go-to-market strategies need to adapt and connect to each other. You may want to use our considerations from each consumer stage as guides for adapting your plans.

Begin by deconstructing your consumer and customer journeys into stage-specific journeys to identify where and how to optimize each component of your business strategy. Use as many tools as you can to understand the journeys, beginning with touchpoint identification, triggers and barriers research and opportunity mapping to get a handle on what you will need to do and to identify your biggest potential wins. Once you have deconstructed stages, develop component-specific go-to-market strategies to optimize your communications with existing and future customers. Our four go-to-market strategy headings might be a good place to start.

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••• shopper insights

Activate and motivate

How improving the shopping experience can help food and beverage brands compete in an omnichannel world

| By Mary Mathes and Hunter Thurman

snapshot

The authors explore three shopper types and what they're looking for in-store and elsewhere.

The buzzword "omnichannel" abounds in every facet of insights and marketing, from media headlines to research and strategy briefs. And while the concept is foundational to successful activation, few internal teams can articulate a crisp definition of the word, much less formulate a linear plan for real-world success. But there is a formula and it relies on diagnosing consumer and shopper perceptions (after all, perception is reality).

For some time now we've consistently heard two questions from everyone from Wall Street analysts to retail strategists to brand business leaders:

- How do we think about – much less improve – our omnichannel experience?
- And how can we manage inflationary pressures without resorting to a race to the bottom?

Herein lies the symbiotic nature of omni-activation: the unlock for these two dilemmas relies upon improving the consumer experience in omnichannel in order to free your brand from having to compete on price alone.

Let's start with the definition of omnichannel, which is: the touchpoints throughout daily life in which a consumer can make a purchase decision and act upon it. The element of "throughout daily life" is important, as the omnichannel continues to fragment and complicate. In terms of "ways to get things," just look at the options a consumer has right now:

- in a store, regular checkout
- in a store, scan-to-pay with your phone
- ordering for next-day delivery (i.e., Amazon)
- ordering for same-day pickup (i.e., Walmart, Kroger, etc.)

- ordering for same-day home delivery (i.e., Walmart, Kroger, Amazon Fresh, etc.)
- ordering from an app for delivery (i.e., GoPuff, DoorDash, etc.)
- ordering from a fast-food restaurant for pickup
- and so on…

To win across omnichannel, brands and retailers must understand how to improve the experience for their target shoppers where and how they choose to shop. Digital commerce is certainly important to some but brick-and-mortar stores remain significant to many. One consumer's reason for preferring to shop online is different from another's preference for in-store.

Most importantly, shoppers across all breeds of hybrid commerce are motivated – and hindered – by far more than mere price considerations.

Using a familiar context – shopping for food and beverage – we can explore the factors that drive, and limit, shopper behavior. Pulling from a proprietary, neuroscience-backed database comprised of gen-pop U.S. consumers, we find there are three primary mind-sets when it comes to food and beverage shopping:

Bricks Bound – these consumers are loyal to brick-and-mortar and represent 48% of U.S. shoppers.

E-com Enthusiasts – these shoppers like buying food via digital means. While they'll still shop in brick-and-mortar, they prefer digital. This group comprises 20% of shoppers.

Fence Sitters – these shoppers are undecided about e-com vs. in-store. They make up 32% of shoppers and can be persuaded to either means of shopping.

In addition to their preferred form of shopping, each of these groups demonstrate a unique psychology when it comes to the criteria they use in deciding what to buy and where and how to buy it.

What does the indexing chart in Figure 1 reveal? Let's break down what drives and hinders each mind-set at the foundational, psychological level.

We'll begin with the 20% who are E-Com Enthusiasts when shopping for food and beverage (Figure 2). These shoppers are driven to explore and discover new things, as they are constantly seeking novel life experiences and better ways of doing things. On the barriers side, they don't want to put in too much effort to get what they need and they don't like waiting. But this is not merely convenience or speed; they're pursuing new discoveries and e-com lets them explore efficiently, in ways that fit their everyday lives.

Notice, they are NOT particularly hindered by price. While actual price will always be a factor, the more influential barriers to their decision-making are the time and effort required for their preferred style of shopping.

A good e-com shopping experience for this mind-set is one that empowers them to discover

Figure 2: The E-Com Enthusiast Mind-Set

and explore. The customer experience should be more visual and less verbal, prioritizing images and video over text-based descriptions. Product-detail pages should not just tell them what the product is but rather what it does for them – and how it FEELS. What will it enable them to do? How will it look, taste, smell or even sound? Digital activation can make huge strides in triggering the experience for them to pay attention and drive purchase decisions.

Now, for contrast, let's look more closely at what drives and hinders the nearly half of shoppers who are Bricks Bound (Figure 3).

Bricks Bound shoppers want to take the lead and be in charge when grocery shopping to do right by their household. They also over-express social barriers: They don't like feeling pressured to conform (such as dealing with other people or being pressured to shop online, use an app or loyalty program, etc.). Again, this group is LEAST hindered by price considerations.

A good in-store consumer experience is one that helps them take control of their shopping and feel like they've won; things like exclusive benefits, products or promos other shoppers don't get. Gaining access to resources and experiences that others can't have is far more compelling in driving fast cognition and purchase with this mind-set than price promotions.

This group also likes to follow their gut: They want products that will satisfy their cravings and desires. Similar to the E-Com Enthusiasts, imagery over text is important to grab their attention. Realistic images that feel tangible (not illustrations or iconography) are very effective.

Packaging and displays that convey high-sensory, fun experiences and products that are intense and unapologetically bold in both formulation and on-pack communication will stand out to the Bricks Bound mind-set. Their decision doesn't need to make sense to them; they're following their gut. Standing out at-shelf is key and can be achieved via design elements such as: color palettes featuring reds, oranges and blacks to capture and engage attention; using or implying motion within imagery (bubbling, spraying, dropping, melting, etc.); high-contrast colors and/or depth-of-field. These are all ways to make these shoppers' brains take notice.

Lastly, roughly one-third of shoppers are on the fence about in-store vs. online (Figure 4). These shoppers want to figure out the most efficient, practical way to get food and beverage; sometimes that might be in-store, sometimes it might be online. This is the only group that is most hindered by pricing considerations and in their case, it's not price itself that is the problem. Rather, they are bothered by what they perceive as unfair or hidden costs.

A good experience for the Fence Sitter will be one that provides the data they need to make an informed choice; brands must empower them to decide. Clear, transparent, verbal pricing information that eliminates the need to comparison shop or worry they might get a better deal elsewhere will also be persuasive with this mind-set – think side-by-side tables and information to help them make informed, rational decisions.

Mental 'neighborhoods'

Shopper psychology goes beyond how someone prefers to buy food and beverage, to reveal patterns in where they shop; the retailers that consumers perceive to best align with their ambitions and decision-making criteria. Shoppers perceive mental "neighborhoods" in which categories, brands and retailers reside (Figure 5). This perception speaks volumes as to the mental jobs a

Figure 3: The Bricks Bound Mind-Set

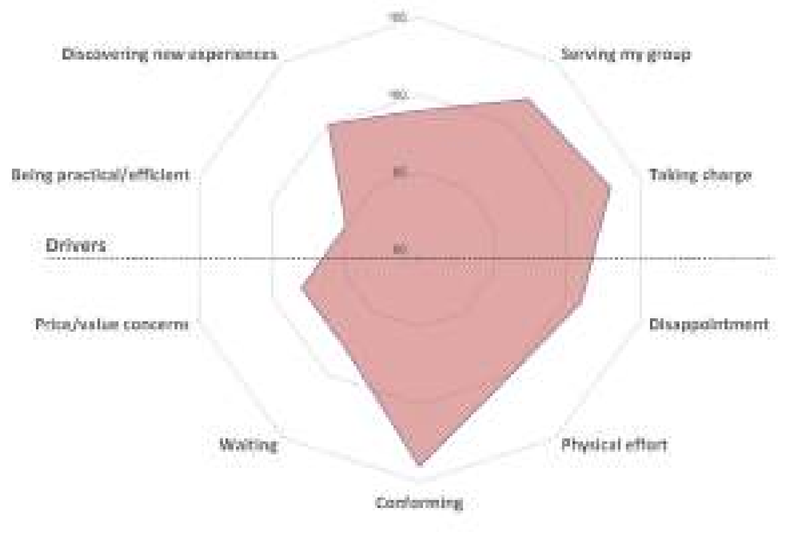


Figure 4: The Fence Sitter Mind-Set

given channel or retailer is perceived to serve in the hearts and minds of your target audience.

The E-Com Enthusiast neighborhood

Target stores, the various drug stores and dollar stores are most aligned with the exploratory psychology of E-Com Enthusiasts, followed by Amazon Fresh. While Amazon Fresh makes sense on a practical level, it's missing the exploration, excitement and discovery of the other three channels.

Drug and dollar, on the other hand, are typically almost pure brick-and-mortar shopping channels. So why the alignment with digital shoppers? What does it mean for strategy and path-to-purchase and how can a channel like dollar be poised for dramatic growth?

This psychology-based view is a great example of how insights can get beyond what is to what could be. While dollar and drug (and largely Target, from the food and beverage perspective) are predominantly bricks-based channels, shoppers perceive that they serve the exploratory mind-set most aligned with e-com shopping.

For one thing, this is where hybrid commerce can light innovative paths forward, if retailers and manufacturers in these channels were to provide, for example, engaging ways that fuel and enable discovery and exploration. The phone is one obvious avenue for teams to explore. For example:

- What if shopping in a Dollar General store could be an interactive experience where shoppers use their phone to make new discoveries, aisle-to-aisle, a la Pokémon Go?
- What if the Target app allowed shoppers to opt-in for a once-per-visit push message that provides an exciting discovery, like a digital slot machine as they shop the physical store?
- What if Walgreens provided a gamified preview in its digital content of unique upcoming discoveries in the seasonal section central to each physical store to pique shopper intrigue and drive visits?

The Bricks Bound neighborhood

The Bricks Bound mind-set is currently most aligned with Walmart, convenience stores and Amazon Fresh. How is it possible that the first name in e-com is aligned with the same consumer decision-making criteria that guides the die-hard brick-and-mortar crowd? What does it mean for Walmart, and other omnichannel retailers, and how can they adjust strategy to win?

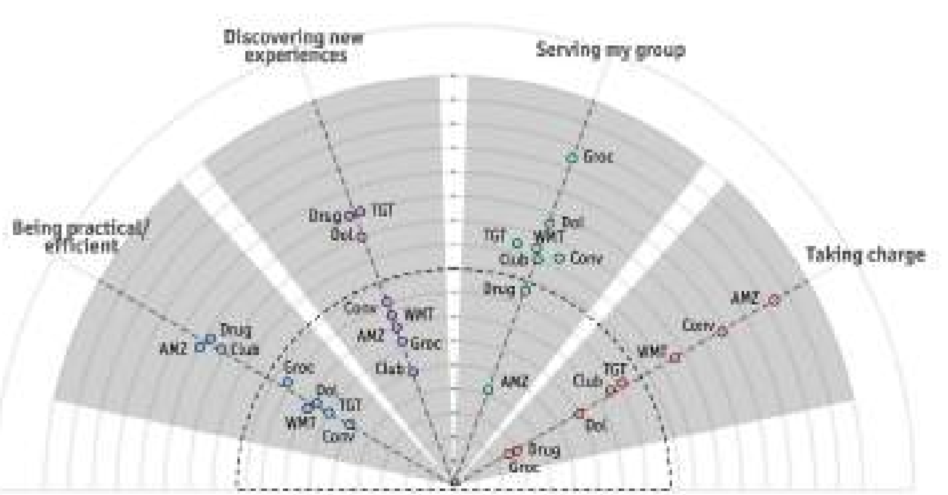
Amazon Fresh is an interesting case in that it is seen as serving both highly impulsive shopping and highly rational decision-making. The Bricks Bound shopper doesn't often shop online but when they do, Amazon Fresh serves their need to get what they want and avoid having to deal with people.

Walmart, on the other hand, is perceived to provide shoppers with advantages other shoppers won't get. And recall, this "exclusivity" is more compelling that merely lower prices. While there are certainly a range of unique activational and promotional opportunities this insight reveals, simply claiming credit should be the first step for Walmart and manufacturers. Something along the lines of "relax, you're with Walmart" would strike a chord for this shopper mind-set and instill the sense of service and belonging central to it.

The Fence Sitter neighborhood

Keeping with the neighborhood analogy, Fence Sitters are "open to relocat-

Figure 5



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	E-Com Enthusiasts	Fence Sitters	Bricks Bound
Gender	60% Female 40% Male	53% Female 47% Male	47% Female 53% Male
Median Income	$50K	$50K	$46K
Political Leaning	Lean Liberal	Centrist	Lean Conservative

ing" to other areas. While they shop broadly, their practical drive is most aligned with Amazon Fresh, drug and club stores. Like the Bricks Bound contingent, when they do shop online, Amazon Fresh serves their desire to get what they need efficiently and at a good value. Club and drug are seen to serve up reasonably efficient shopping needs across categories.

Clarifies the chaos

The neuroscience of consumer decision-making clarifies the often-mysterious chaos of omnichannel and offers three key lessons to carry forward:

Lesson 1: Omnichannel activation should NOT aspire to a consistent experience. Shoppers use different means of shopping (e-com vs. bricks-and-mortar) with very different decision-making lenses. Therefore, digital CX should not seek to simply replicate the bricks experience.

Lesson 2: Only a third of consumers represent a true omni-shopper mindset. These Fence Sitters are the more rationally minded shopper audience, which is where most strategy and activation begins and ends, assuming that shoppers behave based only on practical motivations and constraints. While this is an interesting group, the majority of the consumer audience is driven and hindered by more emotional factors.

Lesson 3: Experience overrides price. Manufacturers and retailers can – and must – avoid the race to the bottom of price promotion. If shoppers are provided with low prices as their core metric, they'll adopt it as their decision-making criterion. However, brands and retailers that tap the TRUE drivers and barriers to purchase decision-making will enjoy far more compelling (not to mention margin-accretive) business results.

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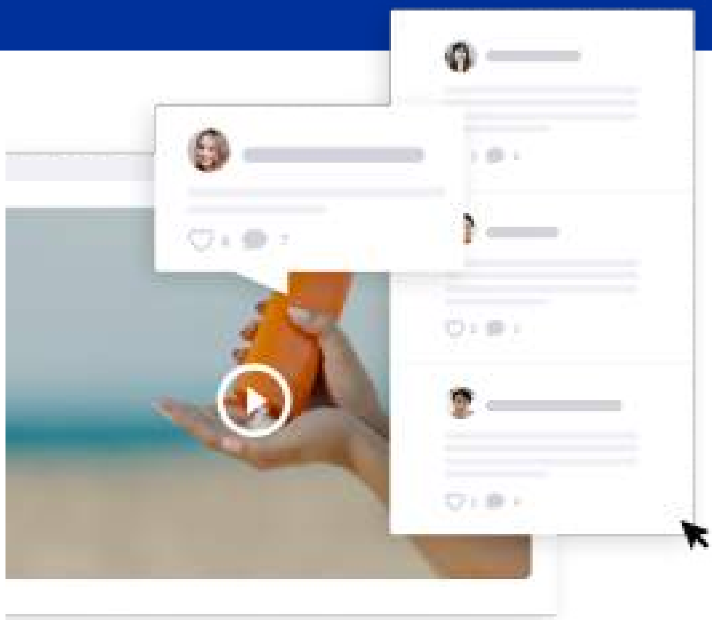

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••• brand research

Secondary meaning

The measure of brand strategy

| By Jerry Thomas

snapshot

In all its facets – from naming to messaging to positioning and beyond – brand strategy provides the foundation upon which companies establish their place in the market.

A brand is some type of symbol, name or sign that identifies and distinguishes one product or service from competitive products or services. We can think of "identifies" and "distinguishes" as the practical functions of a brand.

There are also intangible elements, such as status signals, values, emotions and feelings, visual imagery and personality traits that can be linked to a brand name.

Trademark law has an interesting concept called secondary meaning and over time a brand acquires secondary meaning through usage and advertising. This secondary meaning is, in effect, a measurement of the culmination (the added value) of a brand strategy. For example, the word "caterpillar" refers to the pupa of a butterfly, a worm-like creature with many legs. That's what we think of when we hear the word caterpillar.

However, caterpillar has also acquired secondary meaning as the identity of a brand of earth-moving equipment. In this context, Caterpillar has acquired massive secondary meaning: it stands for strength, steel, durability and power; it stands for building, construction and progress; it stands for diesel clatter and the color yellow. Brand strategy is about building the right type of secondary meaning for your brand.

Three foundational concepts

Brand strategy is built atop three powerful foundational concepts: the first is concentration of effort and energy, so that branding themes and messages break through all the noise and the clutter. The second foundational concept is brand differentiation. That is, how does a company differentiate its brand from those of competitors? This differentiation can be real. It can, for example, be a technological or performance advantage or a perceptual (e.g., superior brand imagery) advantage.

The third foundational concept is targeting. Which markets or market segments should a brand focus on? As you can see, there is similarity between the first concept and the third, in that both involve focusing marketing efforts. Once company leaders have exploited these basic concepts to their advantage to create a solid brand strategy, they can charge higher prices and enjoy greater customer loyalty. They then have some protection from the ups and downs of business cycles; they also have some insulation, or cushion, to protect against adverse publicity, and a good brand strategy makes all of their advertising and marketing investments work better.

Brand strategy can be applied to the corporation itself. For example, Procter & Gamble is a giant CPG company that owns hundreds of brands such as Tide detergent, Crest toothpaste, Bounty paper towels, Downy fabric softener and Pampers diapers. Each of these brands has its own strategy and marketing plan to support it. Likewise, Procter & Gamble as a major corporation has its own strategy and marketing plan that is largely separate from the strategies of its many brands.

Most likely, P&G's corporate strategy and marketing are focused on investors around the world who might choose to invest money in P&G and on governments and thought leaders globally who might want to impede or block the company's commercial activities. The concepts of brand strategy apply to corporations as well as to their individual brands.

Thinking deeply about the answers

What are the core elements of a brand strategy? It involves asking basic marketing questions and thinking deeply about the answers. Questions include "Who do we target?" "How do we position our brand vis-a-vis other brands?" "How do we differentiate our brand? "What type of a brand image do we want to portray?"

Company leaders also need to think about what kind of personality traits they want their brand to exhibit. What is their pricing strategy? If the category is potato chips, they may want the brand's image and personality to be fun and bouncy, but if they're selling caskets, they may choose a somber and serious tone. So, target market, differentiation, brand image and personality and pricing must be woven together so they harmonize and reinforce each other to achieve synergy.

How does a company get to an optimal brand strategy? It's complicated and takes a lot of iterations. Brand strategy results from a combination of a) good primary research and b) strategic vision. To create great strategy, both inputs are needed. Typically, qualitative research techniques are relied upon (focus groups, depth interviews, ethnography) to really understand the deeper motivations and perceptions and how people feel and think about your brand and competitive brands.

The qualitative research helps define the language, concepts and ideas that can be employed to build the brand strategy. At this point in the process, the strategic vision of senior executives is incorporated into the strategy concepts, if possible. Now, the strategy concepts are ready for survey-based research to prove beyond doubt which strategy or strategies will lead to a winning brand.

Very often, a brand might identify 10 to 20 possible strategies based on the qualitative explorations and inputs from senior executives. Melding the research understanding with management's strategic vision yields the very best strategy concepts to test. These vision-enhanced strategy concepts are evaluated by survey-based concept testing among target audiences.

Monadic testing is always recommended if corporate budgets can afford the investment. Then, it is test, refine and retest until decision-makers arrive at a strategy concept that scores high enough to justify the actual adoption and execution of the brand strategy. Strategy concept testing among the target audience is the ultimate measure. Sometimes, several concepts will score very high. In these instances, research leaders fall back on secondary considerations: Which strategy provides the best differentiation? Which strategy can be best supported by media advertising? Which strategy is most defensible? Which strategy can last the longest?

At the heart of brand strategy is a concept called positioning. Strategic positioning is the core theme, or axis, of the brand strategy concepts. Positioning is the central premise, the guiding principle. If we think about marketing strategy as a giant puzzle, strategic positioning is a very large piece sitting right in its center.

The word "positioning" implies a target. A brand can be positioned against or in relation to a target market. This is a common starting point and a brand can be positioned against a market segment rather than the whole market or against a consumer motive or consumer characteristic.

For example, Volvo positions its automobiles against consumers who are highly concerned about safety. Southwest Airlines positions its advertising and services against consumers who appreciate fun and a sense of humor. Dawn dishwashing liquid positions its brand against consumers who are greatly concerned about the damage of oil spills on birds and other wildlife. Mercedes positions its cars against higher-income, upscale consumers. Positioning is a major part of strategy concepts as they are prepared for consumer testing.

It is important to test the strategy concepts, because if company leaders know their strategy is right and will work over the long term, they can stick with the strategy through thick and thin. They can consistently invest advertising dollars to support it because they have analytics and evidence that it will work.

In testing strategy concepts it's crucial to make sure they all follow the same content outline, are about the same length in number of words and employ the same ratio of illustrations to words.

Positioning is the central premise, the guiding principle. If we think about marketing strategy as a giant puzzle, strategic positioning is a very large piece sitting right in its center.

The degree of finish from one strategy concept to the next should be the same. Execution does matter and concepts at a higher level of finish and polish will tend to outscore those that are less-developed. The monadic samples that will be used to test each concept should be demographically balanced and have the same proportion of brand users in each sample. Otherwise, the samples with the highest proportion of brand users will outscore the other samples and corresponding concepts.

The details of strategy execution can magnify and enrich the strategy. A wonderful example is Morton Salt. More than 100 years ago, the company developed a salt that did not cake-up when exposed to high moisture, leading to the great slogan, "When it rains, it pours." The ad agency created an ad picturing a confident young girl with an umbrella walking in the rain and carrying a package of Morton Salt (accidentally pouring out of the package). The girl's energy, self-confidence and the bounce in her steps added immensely to the appeal and the attention value of the ad. Executional details like these can magnify and enhance brand strategy. Conversely, poor execution can doom a strategy. That's why it is important to test the advertising to make sure it is as good as the strategy. Details of execution matter a great deal and consumer research can help the tweaking, fine-tuning and retesting so all advertising details are harmonized in a way that magnifies the effect of the overall brand strategy.

Become extremely valuable

One final thought: If the brand strategy is right, and if it's consistently pursued, and if the advertising investments are sufficient to break through and build positive awareness, over time that brand can become extremely valuable. In many companies, the value of the brands they own is much greater than the book value or the market value of the corporation itself. So there's a great prize at the end of the marketing rainbow if the brand strategy is right.

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diversity in research

An inaccurate reflection

Where's the designated Black consumer market research?

| By Pepper Miller

snapshot

In an excerpt from her new book, "Let Me Explain Black Again," Pepper Miller highlights the importance of Black representation in marketing research.

The market research industry shamefully lacks diversity and inclusivity. According to Media Post,[1] the breakout of race and ethnic representation in the research industry is: 68.9% white; 13.2% Asian, 10.2% Latino, 4.9% Black American, 0.2% American Indian and Alaska Native.

This lack of representation leads to a deficit of insights. Diverse talent and relevant tools and practices would direct recruiting and interviewing of underserved segments and help brands understand and better communicate with them. Business leaders must unlearn the one-dimensional traditional practices to fix the deficit and incorporate a new approach.

I am grateful for the clients who invest in Black studies and the respondents who participate in them. Yet, comparatively speaking of the industry at large, throughout my market research career, there has been little designated research conducted with Black Americans by Black Americans.

Most of my work has been conducting qualitative research – focus groups, ethnographies, one-on-ones, executive interviews, listening sessions and the like with Black Americans. What I love about my work is the opportunity to converse with respondents – real people – who, in addition to sharing their opinions about particular products, services or advertising, talk about their dreams, hopes, experiences and challenges as Black Americans. I've learned so much about the Black community and myself from these conversations. I live in a Black community in Chicago and appreciate how daily interactions with it have served as my lab for observations. But it's the research projects, combined with my personal experience, that has been a major resource of Black insights for my work over the years.

Away from focus groups

Today, some major big-spender brands are moving away from focus groups. The quest for Black (and any) insights from this methodology has become

questionable. They believe little is achieved from the process and say they aren't learning anything new.

Here's the problem: In today's culture, where diversity has become one of the drivers for inclusion, for market research, diversity is meant to cover a variety of ethnically homogeneous studies. But that rarely happens. Very few brands are investing in Black-designated research. They pat themselves on the back for practicing "fair representation" by including one or two Black people in predominantly white focus groups and look to Census population numbers as their rationale – if Blacks are 14 percent of the population, then 14 percent should be represented in a mainstream focus group. Again, "They speak English, don't they?" is a rationale for not investing in Black research and, therefore, rolling Black respondents in with mainstream. Many Black respondents in this situation are less honest and authentic. They tend to tell the truth but not always the whole truth.

The power of the introduction

More than 20 years ago, when conducting focus groups in some of the top Black-populated markets, a few respondents from various markets stopped to chat with me before exiting the focus group room, offering comments and questions such as:

"Why the all-Black group?"

"Why are they separating us from everyone else?"

"I wanted to share something about being Black [in America] but I wasn't sure what was happening."

Black people should be comfortable in focus group settings, especially with a Black moderator, but they aren't always. Given our history, it's common for Black people to be suspicious. Consider the Black focus group experience, whether in person or virtually:

- They are likely screened and recruited by a white recruiter.
- They are likely to be greeted by a white hostess.
- Most are not "virgin" respondents and believe those observing are white.

So, the revelation of the exit questions from Black respondents years ago inspired me to invite Black respondents to be ... Black. In every group since then, during the introduction, I ask: "How many have participated in a focus group discussion – virtually or in person?" Hands go up. I then ask, "How many have participated in an all-Black group?" Maybe one hand of six to eight respondents is raised, but most often, none.

I then explain that sharing their honest opinions helps brands better understand and serve the Black community. Thus, it is essential for them to share their honest perspectives from the Black lens and to be authentic during this discussion. "Think about Thanksgiving," I would say, "and how some of us have moved from the formal dining room table to the kitchen to have dessert, which might be ..." I pause, and many shout out: "sweet potato pie, banana pudding, pound cake, etc."

I continue with, "So when it's just us, sitting around the table having our favorite dessert, I want to have that conversation here!"

None of this is leading. Blackness and Black culture are on our radar every day. Most Black people think about Blackness 90 percent of the time, versus whites, who think about being white 10 percent of the time. So in research, especially in this industry that lacks racial diversity, it's important to make respondents feel comfortable by introducing relevant and relatable examples in the methodology.

Create a connection

Non-Black interviewers can have conversations with Black respondents in qualitative research studies but Black interviewers create a better connection and encourage honest conversations.

Recently, my company conducted focus groups for a major drugstore chain. Included in that study were separate groups of Black men. I hired a Black male moderator to run the virtual groups. The men were ecstatic over his presence. Following introductions, the moderator allowed them a few minutes to express their delight in participating in an all-Black male focus group with a Black male moderator:

"This is really cool!"

"I never expected to see all these brothers and a brother leading the discussion! No offense, man, I just knew you were going to be white."

"No one ever asks for our opinion."

More comments like these were shared and similar comments from previous mixed-gender groups are often heard as well.

If you're a non-Black interviewer addressing an all-Black group, it's

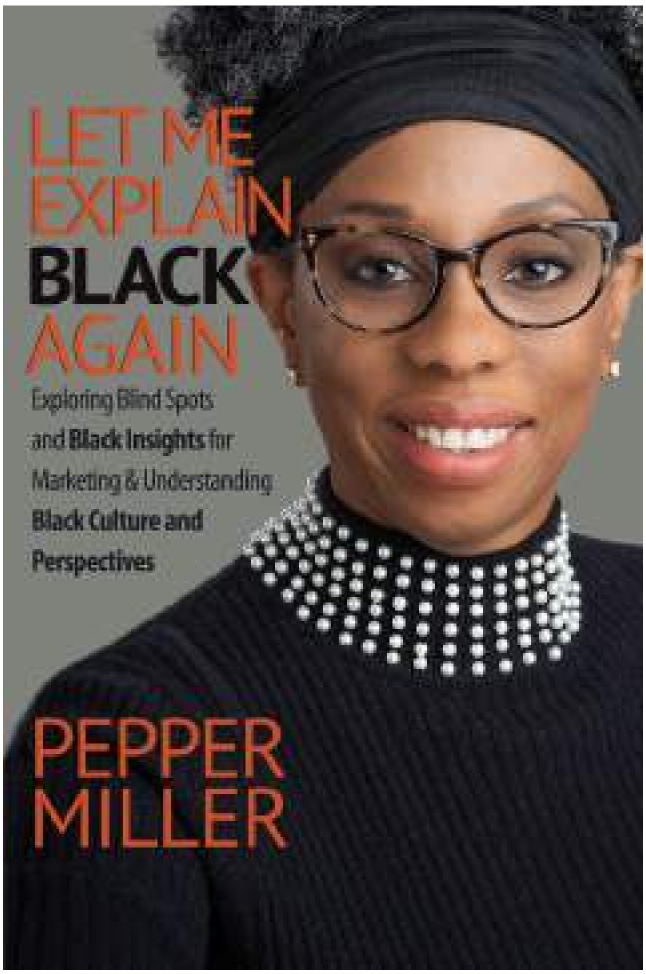
Encourage respondents to tell their truth. Invite Black respondents to be authentically Black. Help respondents understand why their honest opinions matter.

important to begin by addressing the elephant in the room. Tell your "truth." Be honest and authentic: "I'm _____ (white, Asian, etc.). I am not going to pretend that I fully understand Black culture."

Then encourage respondents to tell their truth. Invite Black respondents to be authentically Black. Help respondents understand why their honest opinions matter.

More work on inclusivity

Technology is another area where more work is needed on inclusivity. I welcome progress driven by technology, even in the face of machines replacing humans. While I'm not a fan of people losing their livelihood to technology, I enjoy the convenience of an ATM, digitally reserved parking lot spaces, toll passes, etc. It's progress. It's where we have evolved.



Market research is evolving, too – to automated information data and artificial intelligence, which are designed to streamline the research process. Some of these benefits include using time more efficiently and measuring results more accurately. Improving technology also allows researchers to tap into unused resources and discover new opportunities.

It's great to have a program that captures words and phrases from focus group recordings, organizes them into similar categories and tabulates them – versus listening to them and manually performing the tabulations – what a time saver!

The problem? Biased information is often baked into AI methodologies. Everyone has biases and people embed them into technology. An algorithm is a procedure used for solving a problem or performing a computation. Algorithms act as an exact list of instructions that conduct specified actions step by step in either hardware- or software-based routines.[2] Automated intelligence and algorithms as related to market research are often developed from standards and experiences by non-diverse engineers, programmers, coders and technicians. Their biases and misunderstanding of Black culture can lead to information that promotes stereotypes, which would continue to widen the gap of ethnic understanding, connectivity and intersectionality.

Artificial intelligence prioritizes user preference, while our civil rights laws prioritize equality of opportunity.[3] In the 2020 documentary film "Coded Bias," then-Massachusetts Information Technology student and Ph.D. candidate Joy Buolamwini shares her experience with artificial intelligence and facial recognition programs. She decided to build an "Aspire Mirror" as one of her class projects. The mirror would be an inspirational tool to motivate her, especially in the morning before she started her day. It could include various images of animals or people that she could transpose over an image of her face. She chose an image of Serena Williams and used computer vision software to create the mirror. It didn't work. Well, it didn't work for her dark skin. Her face was not detected. So, Buolamwini put on a white mask and the software detected her face. When she took off the white mask, there was no detection. She checked the lighting and camera position. Still the same results without the white mask. During further investigation of the program, she learned that most faces in the program's database were of men, lighter-skinned individuals, etc. In other words, not faces like hers – darker skin, with a broader nose and full lips.

More truth than we realize

Hollywood creates stories about machines that not only think but reason. And while we look at these stories as entertainment and pure fiction, there is more truth baked into these themes than we realize.

The Journal of the American Medical Informatics Association suggests that if those models use data that reflect existing racial bias in health care delivery, AI that was meant to benefit all patients may worsen health care disparities for people of color. While the sophisticated technology may be new, the Federal Trade Commission's attention to automated decision-making is not. The FTC has decades of experience enforcing three laws important to developers and users of AI:[4]

Section 5 of the FTC Act. The FTC Act prohibits unfair or deceptive practices. That would include the sale or use of, for example, racially biased algorithms.

Fair Credit Reporting Act (FCRA). The FCRA comes into play in certain circumstances where an algorithm is used to deny people employment, housing, credit, insurance or other benefits.

Equal Credit Opportunity Act (ECOA). The ECOA makes it illegal for a company to use a biased algorithm that results in credit discrimination on the basis of race, color, religion, national origin, sex, marital status, age or because a person receives public assistance.

Enthusiasm and caution

We have to approach this new world of technological market research with both enthusiasm and caution. As business leaders and market researchers we must be vigilant about planning, foresight and inclusion. In particular, we must determine how the market research industry can harness the benefits of AI (and traditional market research practices) without inadvertently introducing bias or other unfair outcomes.

We must ensure that Blacks and other people of color are at the table and their ideas and voices are welcomed through their respective cultural experiences. These collective ideas would surely be useful in creating programs, methodologies and tools to ensure a broader reach, effective participation and insightful analysis in our studies.

Relevant market research matters!

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••• millennials

Raising Gen Alpha

How Millennial parenting is impacting the next generation

| By Helenor Gilmour

snapshot

Living through one upheaval after another and growing up in a digital world has shaped how Millennials parent, a year-long study finds.

Previously referred to as the "snowflake generation," Millennials are now parents (aged between 27-40) and ripping up the rule book to raise their Generation Alpha kids in their own unique way.

Millennials have matured into parenthood in truly unprecedented times, characterized by a backdrop of turbulence and worry and punctuated with a seemingly unending cycle of once-in-a-generation events – from a global pandemic to war in Ukraine.

They are also the digital generation, who have grown up with the internet and social media, making them uniquely placed to understand the benefits the online world can bring to their children's lives, along with potentially negative effects on their mental health.

So what does this all mean for Millennial parents and their Gen Alpha kids?

To find out, we at Beano Brain, a kids and families insight consultancy, conducted a year-long study with more than 200 hours of face-to-face interviews and a survey of 2,000 U.S. and U.K. parents. We discovered that there has been a seismic generational shift in parenting ethos from "do as I do" to "fix what we did."

Our findings, detailed in our white paper, Raising Gen Alpha: How Millennial Parenting is Impacting the Next Generation, show that Millennial parents have a desire to be omnipresent in their kids' lives, there for the big life events as well as the small stuff. This means Millennial moms are prioritizing full-time parenthood over their careers – and we use "mom" here, as Millennial dads, despite being more emotionally present than previous generations, are still physically absent.

Raised as opinion-formers and stakeholders, Gen Alpha has a huge influence on family purchases, which has seismic implications for brands who are looking to gain trust, share of voice and customer loyalty within the lives of families and young people.

And Millennial parents are professionally parenting like no other generation before them. From planning the route to parenthood amidst career and personal goals, to actively selecting the parenting style they want to adopt, Millennials take their role as parents as seriously as, and sometimes instead of, their next big career move.

In fact, we found that 69% of Millennials waited until they were married or living with their partner before having children and 34% of Millennial parents actively planned and researched when would be best to have children, compared to only a quarter of Gen X parents.

Forty-seven percent of Millennial parents have read up on and selected a parenting style vs. 37% of Gen X – this is especially important for Millennial dads (54%).

Keep up with peers

Millennials are more likely to seek out advice online than Gen X parents but this brings new levels of pressure, with 42% of Millennial parents feeling the need to keep up with their peers while only 26% of Gen X parents state the same.

Millennial parents are not immune to the effects of influencers, with 45% stating that celebrity influencers make them "feel bad."

Having grown up in a social media goldfish bowl, these digital natives are more digitally nervous for their own children with 75% of Millennial parents trying to keep their children off social media for as long as possible. And 35% of Millennial parents believe that a child's digital footprint should be erased once they turn 18 – rising to 45% of Millennial dads.

Present in all areas

As Millennial parents reflect on missed moments and conversations that took place in their own childhood homes, they are eager to ensure they are present in all areas of their child's life at any given moment – 77% of parents are prioritizing time with the children over careers.

Millennial moms, rather than dads (59% vs 49%), are more likely to be putting their career on hold or giving less attention to work to focus on raising children. Sixty-two percent of Millennial dads say they share parenting duties equally with their partner but only 43% of Millennial moms say the same.

The Millennial dad is more emotionally present than ever but is yet to improve on physical presence. In fact, Millennial dads are no more likely than Gen X dads to actually prioritize time with their children over their careers.

No longer the only way

Millennial parents are increasingly pushing back against formalized education and there's a growing belief that traditional routes into careers and, indeed, life are no longer the only way to raise modern adults.

Fifty-seven percent of Millennial parents believe that schools are not preparing children to be citizens of the future compared to 47% Gen X. Some 8% of Millennial parents are home-schooling and 36% would consider it. Only 12% of Millennial parents say they want their child to attend university (38% of the 18-year-old U.K. population is currently at university).

Sixty-five percent of Millennial parents feel that their children don't have the freedom to roam as they did as a child and 55% fear the negative influences of social media.

Eighty-one percent of Millennials think it's more important to be happy than to be "successful."

Forty-five percent of Millennial moms believe that being mentally healthy is important versus just 31% of dads.

Give their full support

Parents are acknowledging that their generations, and previous ones, have contributed to the global problems and so they give their full support to their Gen Alpha children who are standing up and speaking out for what they believe in. Fifty-three percent of Millennial parents believe that this generation will help solve the problems caused by previous generations. This theme is rooted firmly in parents' fears for the planet and the world their children are inheriting.

Implications for brands

This desire to be present and their democratic approach to parenting means that Millennials are enjoying a super-close relationship with their Gen Alpha offspring. Their individuality is celebrated by their parents, meaning that Millennial parents are more likely to encourage their children to stand up for their beliefs.

Frustrated by authority, they are pushing against the traditional symbols of success and authority and prioritizing happiness and fulfilment for themselves and their children. And they will abandon systems, structures and authorities they don't agree with or respect and simply find their own way.

The challenge for brands and marketers is how to respond to this focus on individuality. How do you cater for mass individualism and how do you respond to a generation that may see you as part of the problem?

The shift in what parents want most for their kids is undeniable and continuing to change.

Raising Gen Alpha has revealed a new era of parenting rituals that will determine which brands Millennial parents will engage with and turn to for help. This affects everything from workplace parental policies to parents seeking out products with mental health benefits.

For brands there is a huge opportunity space linked to Millennial parents' emphasis on their children's happiness and mental health and the strong desire for their kids to spend more time outdoors playing and exploring independently.

This is potentially a sizeable innovation area for creative and experiential designers and for products that lend themselves to cross-family enjoyment.

Parents want brands to help them help their children be citizens of the future but shouldn't forget to be playful and fun with a renewed focus on happiness as an end goal.

Helenor Gilmour is head of strategy and insight at Beano Brain. She can be reached at helenor.gilmour@beano.com.

Methodology

- Face-to-face in-depth interviews with 30 parents and expectant parents of Gen Alpha (kids aged 0-12) from across the U.K. and U.S.
- Longitudinal research with over 200 hours of face-to-face interviews throughout 2022 with Trendspotter panels (kids aged 7-16) in the U.K. and U.S.
- Quantitative research surveying 2,000 parents of Gen Alpha in the U.K. and U.S.

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••• b2b research

The power of provocation

Report outlines the yearning for more visceral B2B marketing

| By Michael Richards

snapshot

A look at why emotion shouldn't be a scary thing for B2B marketers.

Business-to-business marketing is boring.

This isn't new information. So why aren't B2B marketers doing something about it?

Accenture Strategy's B2B Customer Experience 2017 study fired a warning shot to the industry when it revealed that 71% of B2B customers increasingly want a B2C-like experience, with 49% of B2B executives admitting their failure to deliver the experience their customers desired most. In the six years since the report, discontent amongst B2B's audience has only grown.

A recent report, The Power of Provocation, by B2B marketing agency alan., conducted with U.K.-based B2B business leaders, reveals that 82% find B2B marketing boring, predictable and repetitive, with 88% yearning for marketers to take a bolder, contrarian and more provocative approach to their work.

Historically, marketers might have argued that the barriers to more vibrant and emotionally-driven B2B marketing were harder to cross. Stakeholder fear meant that the B2B industry adopted a conservative and risk-averse culture in which brand-building exercises were frowned upon, believing it was all about the transaction and closing the sale rather than about eliciting an emotional response. But our report reveals that times have changed.

The surveyed business leaders acknowledge the risk aversion and the brand-building hesitancy but believe that it's marketing's responsibility to push those boundaries. Some 91% want marketers to become accountable for educating businesses on brand-building and 90% want marketers to step up and tackle the stagnant culture of risk aversion themselves. The ball is in marketers' court to kick-start a business-to-business marketing revolution. So what strategies can be implemented to rectify the situation?

Lessons from B2C

The lessons can be learned from B2C. Business-to-consumer marketing is known for gaining deep insights into both audiences and potential audiences, creating subgroups on demographics such as location or gender identity to ensure that any marketing delivered has a tailored message to build a stronger connection with the brand.

The same isn't often said for B2B marketing, with a concerning amount of survey respondents (82%) stating that B2B brands fail to personalize for their target audience. And 56% feeling that B2B brands talk to them as if they are anonymous automatons defined by their job title.

The Power of Provocation report found that 70% of U.K. business leaders will identify with brands tailored to them, rather than a homogenous bunch who share the same job title or sector. Meaning B2B marketers just need to find their tribe.

Taking the report's findings into account it seems that B2B marketing decisions rely on outdated assumptions – and frankly stereotypes – of who buyers are. By adopting B2C strategies, like relying on robust insights and research, B2B marketers can better understand their customers' needs, beliefs and attitudes to find out what they want to achieve. From there, marketers can review and identify exactly who they can serve best.

This means they should focus on attracting the customers who matter, catering to their needs with both marketing and the offering and ensuring that what the business stands for is reflected in every touchpoint. Much like a B2C brand.

Harnessing emotion

With targeting being more streamlined, what about the content itself? Now regarded as B2C's boring sibling, B2B marketing techniques were once at the forefront, being implemented almost 100 years before the B2C boom of the late 1990s. When thinking about B2C brands that stand out, many may come to mind – Apple, Spotify, Nike – each of which generates debate, polarizes opinion and boasts not just loyal customers but advocates who passionately defend the brand. And while the same cannot be said for B2B yet, the first step to unlocking such affection is harnessing emotion in marketing.

Of the surveyed U.K. business leaders, 98% don't think that business brands connect with people on an emotional level, with 74% of business leaders calling for B2B marketing to connect with its customers in a more meaningful way.

B2C marketing has emotion at its heart. Brands like Coca-Cola or Dove don't communicate their products and pricing so much as they communicate emotions to connect to the feelings of consumers. A stark comparison to B2B's campaigns that sell a product with industry jargon and expect their complex audience of decision makers to keep up. B2B products should adopt the same practices by using a vocabulary of emotional marketing. Communicating to their audience with a personality relevant to how businesses think and connect.

B2B buyers are just as susceptible to emotional brand triggers as B2C customers and are significantly more connected with vendors and service providers than consumers are, given that B2B purchases are expensive and can carry risk for the business. And yet the power of inciting strong, visceral emotions is often overlooked in B2B marketing efforts.

Sixty-two percent of alan.'s respondents from the C-suite said that they have to feel fear, or worse, for them to take action on a problem facing the business. More than a third of the buyers (38%) stated that they needed to feel intense anger, bordering on rage, to take action. And yet a measly 7% have had this degree of emotion set off by B2B marketing.

And while fear, anger and anxiety may feel extreme, they are the emotions required to create the much-needed tipping point for action. But the depth and quality of the emotion, and how they are mixed and matched, can have a grand impact on the customer's buying journey.

Plutchik's Wheel of Emotions

Robert Plutchik's wheel of emotion sheds some light on how customer emotions lead to purchasing decisions by providing a formula for mixing and matching emotions. Beginning with eight emotions in four pairs of opposites, the closer the emotion is to the center of the wheel, the more extreme the emotion is. For example, at the center – rage or admiration – and at its furthest – annoyance or acceptance. Blending the wheel provides even more emotions; for example, joy and trust make love while trust and fear create submission.

With 43% of B2B buyers in the survey claiming that they need to feel intense fear, bordering on anxiety, to take action, we should use Plutchik's wheel to understand that fear stems from a threat, whether that be the fear of falling behind or being exposed to risk, and the natural reaction to fear is to find safety. B2B marketers should utilize this, not by scaring potential customers into purchasing a product or service but instead controlling the level of fear by evoking the elements of association. In eliciting the required emotions, marketers can build a powerful brand message.

Of course, there is a fine line between sparking fear and inciting a riot, but by approaching it correctly B2B marketers could ignite some life back into their campaigns. The key is ensuring that any criticism or fear-striking statement is truthful.

Recognize the humans

To ensure success in connecting with customers on an emotional level, it's important to recognize the humans behind the business. Business customers are consumers too and half of all CFOs and CIOs surveyed for our report want brands to demonstrate an understanding of their experience as human beings.

B2B often prioritizes product truths over human truths, the opposite of how it should be. The business audience needs to know first that the product will ease their anxiety or resolve their fear. Only then will they be open to being told about how the product works. By giving a product or service a purpose or soul, the customer will then make room in their minds for it on a more human, emotional level. And at a time when only 1% of the decision makers surveyed believe that B2B marketing shows a meaningful understanding of the human experience, it's time for B2B to up its game.

Eighty-nine percent of The Power of Provocation participants think that the majority of B2B brands take a mainstream and generic position on the state of the industry at best. It's up to B2B marketers to rectify this reputation.

The B2B arena lacks bravery, and by borrowing a few key strategies from B2C, businesses can inject provocative and inspiring stories into their brands – with intelligence, imagination and emotion.

The biggest mistake B2B marketers make is thinking that they are appealing to other companies, when in fact it's the people who work for those companies that they must speak to; people full of emotions, feelings and thoughts who make purchasing decisions on behalf of the business.

And the second biggest mistake is thinking that one size fits all. Research by B2B media brand Raconteur recently revealed that in 94% of cases, more than six people are involved in the decision-making process, each from different departments and of varying seniorities, which makes for one very complex buying committee.

Engage and incite

Targeting decision makers as a homogeneous blob will fall flat. Connecting with the humans behind the job roles with emotional and honest storytelling is the best method to engage and incite action. Ninety-one percent of our survey respondents are calling for B2B brands to show provocative, challenging and forward-thinking perspectives. The business audience is screaming for a braver B2B and by just taking a leaf out of B2C's book, B2B brands can stand out in a sea of beige.

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LEARN FROM THE BEST IN THE BUSINESS

Propelled by insights: How Gatorade utilizes foundational research to drive brand growth

Gatorade, Propel

Over twenty years ago, Propel was successfully launched as the first fitness water on the market. In 2023, the brand is getting renewed attention with breakthrough marketing and a full rebranding. In this session, we will explore how the insights team drove changes to the brand through a multi-year process of foundational insights and strong storytelling. We will also discuss the balance of different types of research that ultimately led to confidence across the organization to make large scale changes on a successful brand.

Key takeaways:

- How foundational insights should be the core of making decisions in both the sort and long term.
- Understand the methods of bringing those insights to life to drive action.
- Discover how to scale this type of thinking successfully across an organization.

NEW YORK

It takes two to tango: Getting the most from long-term supplier partnerships

Macy's, SouthPaw Insights

There's a time and place for one-time flings, but there are also a lot of upsides to a long-term relationship – in both love and research!

We've been working together for five years and have partnered on dozens of qual projects, including intercepts to understand shoppers' reactions to new store concepts, online groups to hear what employees think about store loyalty programs and many, many in-store and virtual shop-alongs. Over the course of these projects, we've learned a lot about healthy communication, trusting and learning from each other and taking risks. By partnering for the long term, your suppliers can get exposure to the different parts of your business and understand how they fit together, internalize your preferred ways of working and find ways to complement your team's strengths. In-house insights teams can get lots of value from fresh thinking by nimble, dedicated suppliers who are well-versed in different research approaches.

In this session, attendees can expect to benefit from the lessons we've both learned about building successful partnerships: dos and don'ts, best practices and how to make a committed relationship with a supplier work for everyone involved.

Key takeaways:

- Upsides to committed relationships with suppliers.
- Best practices for making a long-term supplier relationship work.
- Potential pitfalls in long-term relationships.

Reclaiming the 3D you: Mirroring, pheromones and other scientific reasons you should be there in-person

Vanguard

One of the major lessons from the past three years is that there is no substitute for in-person interaction. But why is that?

Much of the conversation revolves around personal preferences or intangible ideas like "rapport" and "context" that don't fit well in a research proposal or business case. This session will explore some of the psychological and biological reasons that people interact in fundamentally different ways when they are in the same physical location. Clint also take a look at the implications for research, for stakeholder management, for productivity and for career development.

Raising Generation Alpha: How Millennial parenting is impacting the next generation and how to avoid alienating millennial Moms and Dads

Beano Brain

How Campbell's leverages behavioral research and augmented reality to fuel innovation

Campbell's, Nailbiter

Additional sessions from:

Ag Access, Aha Insights Technology, Attest, CFR Communications for Research, Comcast, Indigo, MarketCast and more to come!

NETWORKING & FUN

MR Jam Session

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

Real Networking Technology

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

cocktails WITH QUIRK'S

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

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.

Additional Networking

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

THE RESEARCH CLUB

WIRe WOMEN IN RESEARCH

••• special advertising section

16 TOP QUANTITATIVE RESEARCH COMPANIES

While both quantitative and qualitative research are necessary in the marketing research and insights industry, quantitative research may be the best option if you need to gain insight from a large sample of consumers.

Quantitative research providers offer a broad selection of effective ways to gather the data needed to gain the best insights from your marketing research project. Whether you need to develop new business strategies or gain a better understanding of your consumer, these companies offer the necessary channels to find relevant and reliable audiences through online or in-person research methods.

Cint

Founded 1998 | 1,013 employees
Giles Palmer, CEO

Cint is a global provider of research technology. Our clients can connect with a global network of over 252 million high-quality and engaged respondents across 152 countries. As one of the world's largest consumer networks for digital survey-based research, Cint enables anyone to survey online audiences and get the answers they need. These answers reveal the sentiments, motivations and behaviors of target demographics – data that can be used to build business strategies, measure the impact of digital advertising, publish research and more. With Cint, researchers can harness a powerful and scalable platform that digitalizes and automates the insights-gathering process.

Phone (U.S.) 1-504-264-5820, (EMEA) +44 20 3514 2100
Cint.com

CRG Global Inc.

Founded 1987 | 100+ employees

As one of the nation's largest and most respected consumer product testing companies, CRG delivers unique insights through best-in-class data collection and research analysis. CRG has unprecedented access to the consumer population through 15 mall intercept locations in metropolitan markets, pre-recruiting and proprietary panel development and management (~500,000 users recruited face-to-face for greater data integrity). We conduct a full array of quantitative research methods including CLTs, home-use studies, focus groups, in-depth interviews, custom and multilingual surveys, attitudinal and behavior research, online surveys and predictive research. Depending on our clients' needs, we are equipped to couple this with in-house research expertise (sensory scientists, statisticians and other market-specific experts on staff) who partner with our clients across their research project life cycle.

E-mail crgsales@crgglobalinc.com
Phone 1-800-831-1718
www.crgglobalinc.com

Decision Analyst Inc.

Founded 1978 | 150 employees
Bonnie Janzen, Executive Vice President
Felicia Rogers, Executive Vice President


Decision Analyst offers a wide array of services to help clients build and sustain winning business brands. Custom research and analytical consulting are Decision Analyst's foundational competencies. We specialize in melding in-depth qualitative investigations, strategic survey research, advanced analytics, mathematical modeling and simulation to solve complex marketing problems. Our services include strategy research, brand research, market segmentation, ATUs, concept testing, package testing, product testing, new product sales forecasting and advertising research. Decision Analyst is a leader in advanced analytics, market segmentation, mathematical modeling and simulation. Our researchers will recommend the quantitative or qualitative technique best suited to your research needs. We design and execute marketing research and consulting assignments in North America, Europe, Latin America, Australia, the Middle East and Asia.

Phone 1-817-640-6166
www.decisionanalyst.com

Egg Strategy

Founded 2005 | 50 employees
Christopher Wilshire, CEO and Founder
Matthew Singer, President

In a world where data is abundant but insight isn't, Egg Strategy partners with you to apply familiar, validated methods in new and innovative ways. Our quantitative experts deploy analytic rigor to turn data into truths that highlight a clear course of action. From custom surveys to advanced analytics, our proprietary approaches to market segmentation, brand equity analysis/competitive landscape assessment, profiling and sizing Jobs To Be Done (to name a few) feed into strategic planning frameworks that help solve complex business challenges. As true strategic partners, we'll design just the right approach to unlock statistically sound pathways to growth. We have specific experience finding white space for (re)positioning, linking to databases for targeting, building quant-derived growth and equity stretch plans as well as profiling where to play and how to win.

Phone 1-303-546-9311
www.eggstrategy.com

Eleven Market Research LLC

Founded 2021 | 6 employees
Brandon Johnson, CEO

ElevenMR is the only market research partner you need. We are a unique mix of methodology, data collection and market research experts with over 20 years of experience. Whatever your research objectives are, we can help with your quantitative data collection needs. We have access to over 70 vetted online panels and for tougher audiences, our custom-dialed phone team excels with specialty targets, such as lab directors, institutional investors and $1 billion+ revenue companies, just to name a few. We also provide full-service project management including consulting, programming, screener review, data collection, translations and coding/tabulations. Let us demonstrate our capabilities. 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

Global Survey

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

Global Survey is your top choice of 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 life cycle 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

InnovateMR

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

InnovateMR is a full-service ResTech and sampling company that delivers faster, quality insights from business and consumer audiences utilizing cutting-edge technologies to support agile research. InnovateMR offers a vetted, proprietary expert network of over 3 million members spanning over 191 countries for qualitative research through Ivy Exec. The team can engage the most sought-after industry experts for a wide variety of research projects and methodologies, including focus groups, roundtables, quantitative and qualitative sampling and more. InnovateMR's extensive panel reach enables organizations to connect the dots with our highly engaged B2B business makers, subject matter experts and key opinion leaders.

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

Insights in Marketing

Founded 1989 | 9 employees
Maria Evans, Quantitative Research Analyst

Insights in Marketing's quantitative research consultant Maria Evans believes in collaboration and loves listening to the people who buy brands and the people who market them. She knows what it takes to win consumers' hearts and her clients count on her research to reveal the "Ahas" that inspire people to love their brands. Leading the insights team for the world's most iconic gaming, travel and entertainment brand, Maria honed her expertise in quantitative market research and analysis. She has 20 years of experience designing studies that guide strategic decisions, resolve business issues and inform major marketing initiatives. Contact Maria for a complimentary market research consultation and learn how you can inspire more people to love your brand by harnessing the power of consumer insights.

E-mail maria@iimchicago.com
Phone 1-847-853-0500
www.insightsinmarketing.com

Just The Facts Inc.

Founded 1994
Bruce Tincknell, Managing Director

We've uncovered unique client insights for over 30 years! Quantitative research is changing and Just The Facts Inc. is on the forefront of cutting-edge methods. Whether our outstanding online surveys, multimode phone or even our unique Qual-Quant™ methods, we achieve actionable results. Our unique "QUAL-QUANT™" process leverages the best of qual and quant worlds to yield rich insights beyond just numbers. Our proprietary process opens up B2C and B2B customers' motivating actions, behaviors and decision-making. Our tool kit uses an array of online, tech-savvy methods from online quant learning, in-depth focused discussions or custom-tailored approaches. JTF is your "go-to partner" for high-quality results. Your research investment leads to optimal business strategies, achieving stronger sales, profits and ROI. Let's discuss your specific needs, ensuring your initiatives are aligned with customer expectations, WE LISTEN TO YOU! Call today for a no-obligation consultation or e-mail info@jtfacts.com. Testimonials: http://www.justthefacts.com/testimonials-x-30.

Phone 1-847-506-0033
www.justthefacts.com

Mindfield Online Internet Panels

Founded 1980 | 110 employees
Gary McMillion, CEO

Mindfield – tech integration and audience insights (formerly McMillion Research). Boasting a rich tradition of almost 40 years in market research and data collection as McMillion Research, Mindfield is the high-end, single resource for all your online and CATI needs. State-of-the-art online solutions that are robust and pleasing to both the client and the online users are daily deliverables for our team. Coupled with MindField Online, the premier consumer panel, research is done right and in high quality with our real-time electronic countermeasures to insure quality data (IQD™). Real-time reporting, dashboards and crosstabs that are presentation-ready are always a few clicks away on all projects. We are the solution you're looking for.

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

PRC Corporation

Founded 1982 | 70 employees
Laura Kibala, VPO

PRC is the premier national market research company with over 40 years of recruiting expertise. Our nationwide database panel includes over 1.5 million respondents and is a perfect resource for our clients' quantitative research needs. We are continually building our quant panel with quality respondents through creative channels and custom recruitment. Our executive leadership and project management teams have a combined experience of over 100 years to help support our clients and ensure unparalleled success for any quant study. Please send your quant specs to bid@prcmarketresearch.com to see how PRC can help you achieve the results you need.

E-mail bid@prcmarketresearch.com
Phone 1-201-265-7500 (Main switchboard)
www.prcmarketresearch.com

Precision Opinion

Founded 2007 | 750-1,000 employees
Matthew McCoy, Chief Operations Officer

For nearly 20 years, Precision Opinion has been providing its clients with first-in-class data collection services. With 600 Voxco phone CATI interviewing stations, we specialize in large-scale health-related telephone surveys for federal and state governments. Additionally, Precision conducts studies across a variety of sectors in B2C and B2B. As a full-service research firm, we offer multiple modes/services including CATI, online, SMS text-to-web, IVR, analytics, consulting, recruiting and panel construction/management. No project is too large or too small. We would tell you that "Precision Opinion is the Most Trusted Name in Research," but it's our job to remain unbiased.

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www.PrecisionOpinion.com

Sago

Founded 1966 | 1,400 employees
Rob Berger, EVP, Global Quantitative

Sago powers understanding, confidence and bolder decisions through technology-led quantitative services and robust global sample. Access consumer, B2B, health care and patient panels comprised of millions of stringently vetted and deeply profiled participants. Leverage our comprehensive suite of quantitative solutions for high-quality insights you can trust. Whether you need quick-turn results with our Rapid Alert Omnibus solution, ongoing quantitative communities or automated quantitative research from our Methodify platform, we have an option for all your quant projects. Experience a partner who works with you at every stage of your project to meet your research objectives, timeline and budget. Connect with us Quant@Sago.com.

Phone 1-732-906-1122
Sago.com

Telepoll Market Research

Founded 1990 | 75 employees
Christine Schmakies, Director of Operations

With over 30 years of experience, Telepoll Market Research is an expert in telephone data collection. Our proven, proprietary methods help guide organizations in almost every industry – from nonprofit associations to Fortune 500 companies. Whether challenging low-incidence and C-level studies or customer satisfaction campaigns, Telepoll tailors itself to every client and delivers high-quality actionable data, even on the most complex and unique projects. We can help. Make the call!

Phone 1-416-977-0608 ext. 222
www.telepoll.net

CALENDAR OF EVENTS

••• can't-miss activities

Reuters Events will host Customer Service & Experience West on **May 10-11** in **San Diego**. Visit events.reutersevents.com/customer-service/customer-service-san-diego.

Marcus Evans will host Nordic CMO Summit on **May 11-12** in **Copenhagen**. Visit www.nordiccmosummit.com.

AAPOR will host its Annual Conference on **May 10-12** in **Philadelphia**. Visit aapor.org/aapor-78th-annual-conference.

succeet will host the Week of Market Research on **May 8-16**. Visit www.succeet.de.

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

Marcus Evans will host the Employee Engagement and Experience on **May 17-18** in **Chicago**. Visit www.marcusevans.com/conferences/internalbranding.

CX Forums will host its Chicago Summit on **May 17-18**. Visit cxforums.org/chi23.

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

Corinium Global Intelligence will host CDAO APEX East on **May 22-23** in **Atlanta**. Visit cdao-apex-east.coriniumintelligence.com.

Quirk's Media will host Wisdom Wednesday on **May 24**. Visit www.quirks.com/events/wisdom-wednesday-webinars-may-24-2023.

GreenBook will host IIEX North America on **May 24-25** in **Austin**. Visit events.greenbook.org/iiex-north-america/home.

ASC will host the Do Not Pass Go Conference on **May 25** in **London**. Visit ascconference.org/events/do-not-pass-go/.

Mystery Shopping Providers Association will host the MSPA Europe/Africa Conference on **May 23-25** in **Portugal**. Visit mspa-ea.org/en_GB/events/eventitem/29-early-bird-fees-until-april-1st-don-t-delay-and-register-today.html.

American Statistical Association will host the Symposium on Data Science and Statistics on **May 23-26**. Visit ww2.amstat.org/meetings/sdss/2023/.

Corinium Global Intelligence will host DataCon Africa on **May 29-31** in **Cape Town**. Visit datacon-af.coriniumintelligence.com.

Strategy Institute will host the Annual Customer Experience Strategies Summit on **May 31-June 1** in **Toronto**. Visit www.customerexperiencecanada.com.

CRIC will host the Future of Insights Summit on **June 5-6** in **Toronto**. Visit www.canadianresearchinsightscouncil.ca/future-of-insights-summit-2023/.

Corinium Global Intelligence will host CDAO Germany on **June 6-7**. Visit cdao-germany.coriniumintelligence.com.

Worldwide Business Research will host eTail Asia on **June 6-8** in **Singapore**. Visit etailasia.wbresearch.com.

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

Mystery Shopping Providers Association will host MSPA ShopperFest on **June 9-11** in **Pittsburgh**. Visit bit.ly/3Uzr0fr.

Strategy Institute will host the Annual Big Data and Analytics Summit on **June 13-14** in **Toronto**. Visit www.bigdatasummitcanada.com.

Pharma Market Research Conference will host its Bay Area Conference on **June 13-14** in **San Francisco**. Visit pharmamarketresearchconference.com/bay-area.

Corinium Global Intelligence will host CDAO Insurance on **June 13-14** in **Boston**. Visit cdaoi.coriniumintelligence.com.

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

Event details as of March 20, 2023. Please see websites for more details.

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

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10 minutes with...

Mohamed Hassen
Consumer Insights Manager, PepsiCo Multicultural

"As consumer behavior evolves, the need for new methodology becomes a must. Marketing research and insights professionals must stay current on the latest trends and tools."

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

What led you to a career in marketing research and insights?

I have always enjoyed work involving mathematical models, big data and investigative research. Therefore, I chose to pursue a career in this field for various reasons. One reason is the opportunity to work with data and technology.

When I joined PepsiCo in Saudi Arabia in 2005, I was blessed to have leaders who saw my potential and helped me grow and build my career path. PepsiCo is a global organization with systematic tools and processes for employees to choose their path forward, and the company facilitates their journey.

I had the privilege to gain critical experiences through taking cross-functional roles on the ladder from brand marketing, revenue management strategy, analytics and consumer insights across multiple geographies and territories. In addition, as I progressed through my career journey, I had the opportunity to work closely with our global insights capability teams and became the go-to person for local deployment of PepsiCo proprietary tools. My curiosity about transforming data to create meaningful stories increased during this time. Marketing research and insights are fascinating fields that combine data analysis, consumer behavior and strategic thinking to help businesses make informed decisions.

You've worked at PepsiCo for more than 17 years. Describe one of your most rewarding experiences so far.

I think my current role at PepsiCo is the most rewarding experience. I help the PepsiCo Multicultural organization through strategic and foundational research to create more smiles in the communities we serve and support small business owners. But I believe the entire journey based out of Saudi Arabia and Dubai gave me foundational knowledge through a profound understanding of market dynamics and consumer knowledge of more than 50 countries and territories in the Middle East, North Africa, APAC, India and China.

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

Yes! As consumer behavior evolves, the need for new methodology becomes a must. Marketing research and insights professionals must stay current on the latest trends and tools.


consumer panel
quantitative research
analysis
Expectations
exceeded.
The Most
Seamless
IHUT
Platform
In Research
Jay Mace
Senior Vice President
Mindfield
"This solution has been ground breaking for clients who struggled with successful and profitable in-home product research."
800.969.9235
Mindfield
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jmace@mindfieldtech.com