QUIRK'S

For marketing research and insights professionals

HOW RESEARCHERS CAN USE THE POWER OF 1, 2 AND 3 TO BOOST THE IMPACT OF THEIR COMMUNICATION

PLUS

Don't hang up on phone IDIs

Put some science back in your segmentations

Research shows value of state's DEI efforts

Also Inside
THE Q REPORT
2023

ADVERTISING SECTIONS

8 Top CX/UX Research Companies

20 Top Data Collection Companies

Quirk's Marketing Research Review
SEPTEMBER/OCTOBER 2023
VOLUME XXXVII NUMBER 5
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insights ASSOCIATION

fieldWORK

L&E research

GreenBook DIRECTORY

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FOCUS ROOM POWERED BY FUEL

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

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

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

Sarah Kotva, Executive Vice President of Fieldwork

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

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

Steve Schlesinger, CEO of Schlesinger Group

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

Roben Allong, President of QRCABob Qureshi, Managing Partner of iView London

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

Kristin Luck, President of ESOMAR

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

Melanie Courtright, CEO of Insights Association

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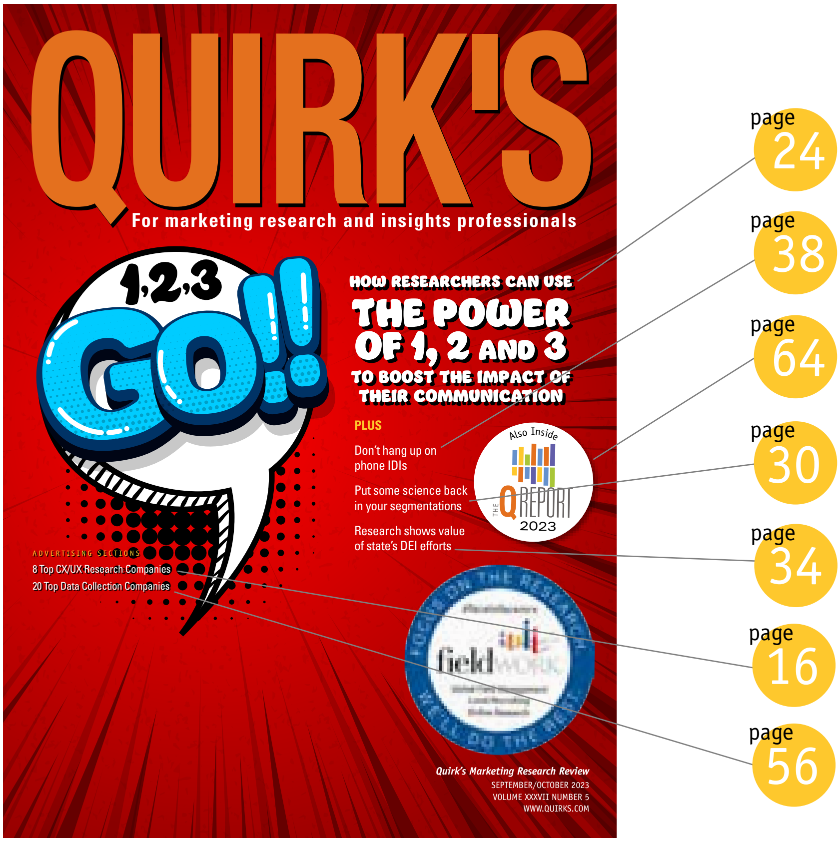

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1,2,3 GO!!

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ON THE COVER

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Quirk's brings AI to your office or home with the Quirk's Event Virtual - AI

Quirk's will host its third annual virtual event on **October 18-19, 2023**. While nothing can beat in-person events for networking, a full 97% of the Quirk's audience is unable to attend in-person events due to timing, geography or costs. This virtual event brings insights professionals together from around the world so they can learn from leading industry experts about the hottest topic in the industry right now – generative AI. **For more information and to register go to www.thequirksevent.com/virtual-global-2023.**

// E-newsworthy

- Generative AI in health care market research
- Tips for understanding the post-pandemic traveler
- Work and Play: Buddy Up Tennis and Empathy
- The Researcher's Bookshelf: Putting a spotlight on racial inequality and business leader blind spots
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// Noted Posts

Quirk's Blog

Insights professionals discuss intentional data use, AI and more at Quirk's New York
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OpenAI, WhatsApp named in most innovative brands list
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The Net Promoter Score: What it is, why it's controversial and its alternatives
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Research Industry Voices

Marketing researchers embrace human-centricity in the age of AI
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Four reasons your marketing research company should get ISO certified
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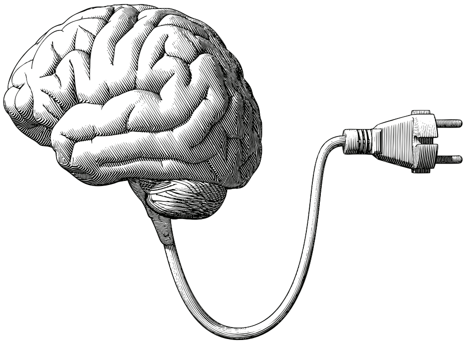

••• dei research

Does board diversity lead to innovation?

While gender, racial and ethnic diversity bring value to U.S. companies, research from the Indiana University Kelley School of Business found that the presence of diverse educational, industrial and organizational experiences among managers and board members leads to R&D innovation that creates economic and social value.

The researchers reviewed a sample of more than 11,000 observations of 971 firms with one or more patent applications between 1996 and 2014. "We looked at [board members'] experiences and not just their demographic background – the more functional aspect of diversity. We looked at outcomes and found radical innovation when directors had more diverse experience, helping to guide firms toward more cutting-edge exploration and success," says Aurora Genin, assistant professor of management and entrepreneurship and co-author of the article "Board experiential diversity and corporate radical innovation" in Strategic Management Journal.

Further, corporate leadership that includes people from educational backgrounds other than business and finance might be less myopic when facing uncertainty. "Noting the benefits of diverse experiences in the boardroom, corporate executives can search beyond the traditional director pedigree (e.g., Ivy League-educated financiers), where female and minority individuals remain underrepresented," Genin and her colleagues wrote. "In so doing, the firm can find more qualified candidates to assemble a demographically and intellectually diverse board, thus cultivating an inclusive corporate culture conducive to shareholder and stakeholder value creation."

••• the business of research

When managers unplug, everyone benefits

Managers who disconnected from their jobs at home felt more refreshed the next day, identified as effective leaders and helped their employees stay on target better than bosses who spent their off hours worrying about work, according to the study, "The importance of leader recovery for leader identity and behavior," published in the Journal of Applied Psychology.

Researchers surveyed managers and their employees at U.S. businesses in 2019 and 2022 to assess leaders' ability to disconnect from work at home the night before and their level of energy and how strongly they identified as a leader in the morning at work. Employees rated their bosses on their leadership ability.

"When leaders completely turned off at night and didn't think about work, they were more energized the next day and felt better-connected to their leadership role. On those same days, their followers reported that they were more effective in motivating them and in guiding their work," says Klodiana Lanaj, a professor in the University of Florida's Warrington College of Business who led the research.

"But on nights when leaders reported that they were thinking about the negative aspects of work, they couldn't recuperate their energy by the morning. They saw themselves as less leader-like and weren't as effective, as rated by their followers," she says.

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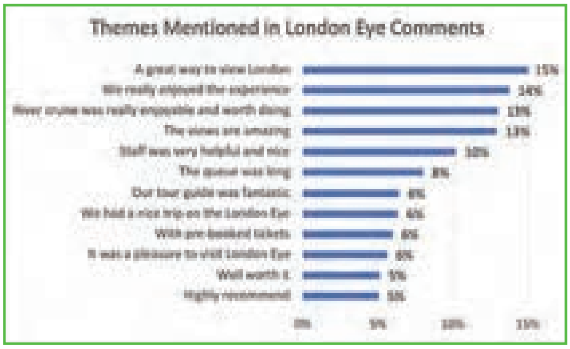

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Trade Talk

By Joseph Rydholm, Quirk's Editor

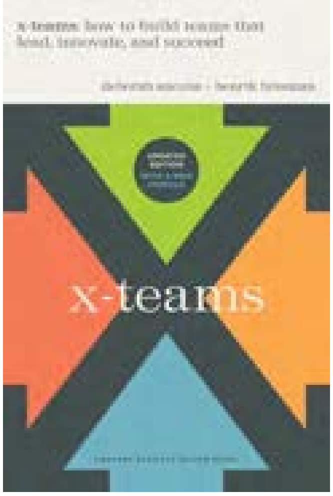
X marks the (team-building) spot

I've been thinking a lot about teams lately. Not sports teams – after all, our local Minnesota professional squads have been paragons of futility for several years when it comes to advancing out of early playoff rounds (except for our WNBA team, which has four recent-ish championships to its credit; thank you, Lynx!) – but work teams.

The pandemic showed us that teams and team members didn't need to all be in the same (physical) place to succeed but in reading various articles about the awkward transition back to office-based work I've wondered about the effects of all of these fits and starts on insights teams.

From purely remote during the pandemic to hybrid to everyone mostly back in the office, I imagine it's a struggle for managers to get the gang back together and working toward the same goals. If that resonates with you, I think the book "X-Teams: How to Build Teams That Lead, Innovate and Succeed" ($32; Harvard Business Review Press) might be worth investigating.

Originally published in 2007, the book was recently updated for our post-pandemic reality and reissued in August. Authors Deborah Ancona and Henrik Bresman are still professors at their same respective institutions – Ancona at MIT and Bresman at graduate business school INSEAD – but as they state in a new preface, the world is a vastly different place from when they assembled the first iteration of the book and, far from being obsolete, team-building skills are even more necessary today, given the dizzying pace of change and our often-disconnected workplace structures and systems.



Their definition of an x-team, in a nutshell, is that it is externally focused, with input coming from within and without (in other words, not insular); it has robust processes in place to enable team members to coordinate and execute their work; and it enforces and encourages timely transitions among team members to move to different aspects and processes to expand their skill sets and also encourage fresh thinking and new perspectives.

To be sure, marketing research teams, unlike some of those discussed in the book, are often already externally focused, working on a project for someone else in the organization (an insights-gathering project, a new product launch or line extension for an internal client, etc.) rather than ideating and building a new product as a group for consumers from start to finish, so the external-facing mind-set is nothing new for them.

But the book is more than just an elaboration of their x-team concept, offering clear, no-nonsense advice on strategies for assembling and managing a winning group. (You know how we love all things practical here at Quirk's so of course I was overjoyed to see actual checklists in the chapter on "x-ifying the team," covering everything from setting up the basics for smooth operation to creating an environment of psychological safety.)

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Joe Rydholm can be reached at joe@quirks.com

Ancona and Bresman offer three strategies or paradigms for how teams can boost their external focus and awareness and thereby deliver work that meets internal needs while also enhancing their internal standing. All three are likely well-familiar for insights professionals:

Sensemaking, which involves understanding others' expectations, identifying key stakeholders and learning where critical information and expertise reside, whether that's inside or outside the organization. Teams need to monitor and assess how the world is changing and any new threats or opportunities that have emerged. And they need a good model of what the outside world is like so that they can change and react accordingly.

Ambassadorship, which marketing researchers will no doubt be very familiar with, as defined by the authors: "[T]eam members need to lobby for resources, get early buy-in for their ideas and keep working for support from top managers."

And **task coordination**, which involves managing the interdependencies with other parts of the organization and groups outside it rather than focusing inwardly.

Sensemaking, of course, is a researcher's bread and butter, as it's all about information-gathering, whether that's through formal interviews or informal chats over coffee. It's asking questions, listening to the responses and analyzing and synthesizing all of the things you've been told so that you can determine how to move forward, what the path ahead might look like and where the landmines might be.

Maybe this team-building stuff isn't so hard after all! Q

••• advice for researchers

ASK THE **EXPERT**

Expert answers to important research questions.

When will consumers hit a wall on accepting price increases?

Across organizations, we continue to hear a common question: When will the music stop on price increases? For many categories, consumers have continued to accept rising prices. And in many cases, consumption has actually increased as prices have risen. The traditional elasticity models are upside down.

For the companies and categories benefiting, there are clearly no complaints. However, there IS a mounting concern that, since we can't explain this consumer behavior, we need to be wary of a tipping point, cliff, wall or other unfavorable metaphor consumers may encounter that causes consumption to plummet.

It's a real concern, and a confounding question. But there is a simple reframe that can empower teams to approach this challenge by focusing on the things they CAN control (unlike the economy, debt ceiling, flu season, etc.).

Simply, it goes back to an old-school term which most marketers are familiar with: the value proposition.

We recently released a report called The Bev 50, ranking the top U.S. beverage brands based on the consumer passion and behavior they drive. Gatorade ranks No. 1. While several sports drinks fared well in the ratings, none touched the emotional voltage achieved by Gatorade.

WHY?

Because while most brands sell effective hydration, Gatorade sells victory by the ounce.

The brand's value proposition doesn't sell functions. It sells FEELS.

And when we think back to the macro question above regarding pricing, this reframes the discussion.

How much is optimal hydration worth?

Now, how much is victory worth?

By making the brand intrinsic to the person, suddenly it's perceived to be worth far more. And stepping back to the question of "When will the music stop on accepting price increases?," the question is actually "How do we make sure the music doesn't stop for OUR business?"

In real life, consumers and shoppers won't simply stop consuming all at once and across categories. They'll make tougher choices, sacrifice those things that are perceived as less valuable and make trade-offs where it doesn't matter as much in their heart-of-hearts.

Don't think about activation and promotion as a way to "cost less." Think of them as ways to "provide more." More fun, more unique experiences, more of the feels. Focus on the emotional connection and your brands will be the last on the list of things to sacrifice.

After all, a tall glass of water provides hydration but it sure doesn't provide victory.

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

ALPHA-DIVER

Have a question you'd like to have answered? Submit it to info@quirks.com.
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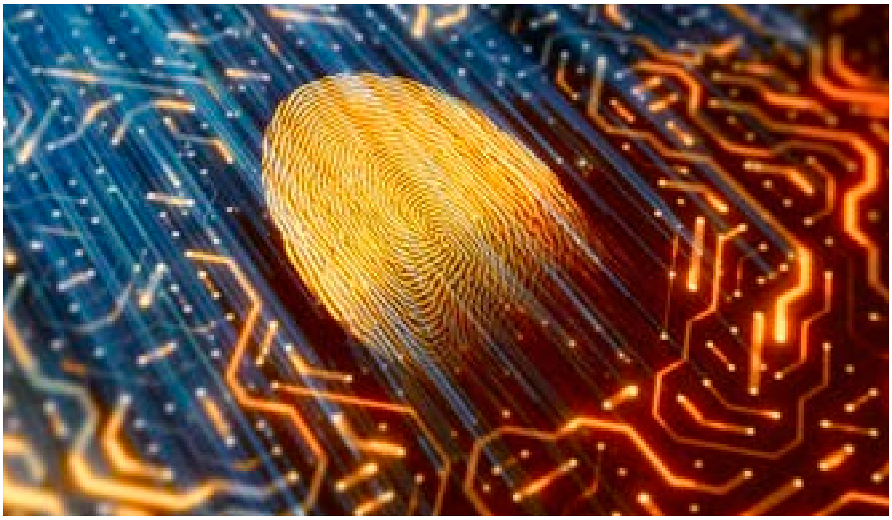


••• technology research

Yes to biometric authentication

Password repeaters fear cybersecurity threats

A majority (57%) of U.S. respondents reported being excited about passwordless technology, a number that mirrors the global response (56%). According to password management solutions company Bitwarden, of the U.S. respondents using passwordless authentication, 40% are or would consider using biometrics such as facial recognition, fingerprint and voice to represent "something you are" and 33% would prefer a PIN, name or word for "something you know." The "something you are" method is more prominent globally, with 50% of respondents utilizing or considering it.

U.S. respondents who said they were not excited about passwordless authentication cited a few qualms. Fifty-five percent prefer to use their memory over their fingerprint or face ID and 36% were worried about their fingerprint or face ID being used against them.

Fifty-four percent of Americans rely on their memories to manage passwords for websites, apps and services at home or at work – up from 49% in 2022. This might help explain why 58% regularly reset their passwords, including 12% who do so every day. To manage passwords, 34% use pen and paper, 30% use a password management software, 23% document passwords on a computer, 19% on e-mail and 3% say they do it another way.

Nineteen percent of respondents admit to having used the word "password" or another common variation of the word as their password. Seventy-five percent use passwords that are at least nine characters in length and 69% use two-factor authentication for work accounts and 70% for personal accounts.

There are some vulnerabilities regarding password repetition. Twenty-two percent have been reusing the same password for more than a decade in the U.S. Around a quarter of U.S. respondents (26%) report being affected by a data breach in the past 18 months. While data breaches may not be preventable, they tend to have a ripple effect for individuals who reuse their passwords on different platforms or websites. Nearly all (93%) of Americans are concerned about cybersecurity threats. In the U.S., almost three-fourths (71%) manage passwords for 10 or more sites – a number that has particular resonance when considering the percentage of Americans who rely on memory to manage passwords.

The survey also looked at habits when it comes to sharing passwords for digital apps and streaming. Despite some companies cracking down on password sharing this year, nearly half (47%) of U.S. respondents, and 36% of global respondents, say they still share passwords for TV streaming services. That's higher than U.S. respondents who share passwords for social media apps (31%), banking apps (28%) and music streaming apps (31%).

The survey also probed password managers in the workplace. Last year, 32% of Americans said they were required to use a password manager at work. This year tracked similarly, with 31% reporting workplace usage, a number that was again higher than the global average of 23%. Of the respondents required to use password managers, 91% reported that their employer provided the software.

Bitwarden's World Password Day survey was conducted by Propeller Insights. It surveyed over 400 Americans and 2,000 internet users globally on how they view and manage their own password security.

The GoodQues Times

Breaking News...
Human-centered design results in better research

In a world where "humanity" has become overused jargon, GoodQues was designed and launched in 2019 as the next-generation "anti-research" research company and a solution for one of the most vexing and unaddressed problems impacting companies in every industry; the lack of empathy in market research.

GoodQues has broken and continually breaks new ground to combat the dry, established norms around insights creation and delivery - ultimately improving how businesses serve their customers and unleashing bigger brand ideas.

Since 2019, GoodQues has expanded insights possibilities across qualitative and quantitative research for the industry...

- Their methodology has continued to capture the attention of Fortune 500 clients with breakthrough, human-centric techniques, such as meditation and moderator casting.
- GoodQues pioneered creativity in research design, designing quantitative and qualitative research for the most engaging, connective respondent experience.
- They've connected empathetic methodologies with technology - with new products such as "smart qual" - analysis that combines both human and machine insights.
- Their storytelling in data outputs and client deliverables has reinvented how companies digest research, making it more actionable, inspiring, and memorable!
- GoodQues growth is upward; the company is making an outsized impact on the country, recently featured as one of the 1,125 fastest-growing companies in the United States by Inc Magazine.

From applying language as a research tool to utilizing psychology principles, GoodQues makes research more human for respondents and clients. **Some of our human-first specialty capabilities include:**

- Attitude & Usage Studies
- Segmentation & Persona Development
- Journey Development
- Cultural Anthropology & Foundational Research
- Market Sizing
- Price Elasticity
- Product/Concept/Ad Testing
- Brand Positioning & Whitespace Mining
- Brand Tracking
- Cultural Trend Trajectory Analysis

GoodQues has appeared in media and forums including...

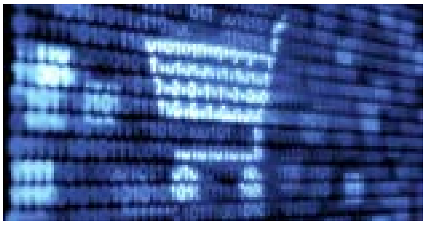
BUSINESS INSIDER ADWEEK Authority Magazine

BENZINGA Inc. SXSW POD DIGITAL MEDIA

GOODQUES
THE ANTI-RESEARCH RESEARCH COMPANY

"GoodQues" pronounced as GoodQues-tion!

To connect, reach out to: Sarah Colbert, Project Manager sarah@goodques.com



••• shopper insights

Shifting expectations

Consumers crave personalized experiences

The proliferation of retail channels, formats, platforms and intermediaries has fragmented the shopping landscape over the past few years. Consumer financial services company Synchrony found that moving forward, there will be a focus on developing more connected experiences across channels, brands, online and in stores.

Of the shoppers surveyed, 67% believe a world where multiple brands created joint offers would enhance their experiences across channels. Forty-two percent would be likely to register or participate in future experiences where brands offer a range of connected shopping options such as an app that connects a concert ticket purchase to customer's calendar and suggests an outfit for the event and where to buy it. Fifty-two percent say they would be interested in an in-store engagement where the associate leverages crowdsourced ratings combined with customer preferences to deliver recommendations in real-time to their phone.

In the future, shoppers would like to reduce the range of available products presented to them. Sixty-two percent believe that their shopping experience would be simpler if stores offered fewer choices and by 2030, 81% expect to see a world where hyper-personalization or "just for me" is rolled out. Fifty-five percent expressed an intent to use onsite personalization services if they were available.

While shoppers have always cared about convenience, today's shoppers are more concerned with the flexibility, access and speed of their shopping experience. The act of shopping has become and will continue to move away from being an isolated activity, instead being embedded into other activities such as scrolling through social media, gaming or going for a walk. Sixty-four percent believe that in the future, shopping will not be a solo activity and instead brands will reach them through separate but linked activities (e.g., social media activity linked to geolocation recommendations while out on a walk, metaverse brand interaction directs shoppers to the nearest physical location with tailored recommendations).

Utilizing smart carts that integrate seamless shopping and checkouts can deliver enhanced value to shoppers. Sixty-seven percent of shoppers agreed that smart carts would enhance their lives, while 75% believe that smart carts would be a possibility and could be popular over the next seven years.

Synchrony partnered with Ipsos Strategy3 to survey 1,000 consumers in the U.S.

••• restaurant research

Feeling the crunch

Dining experience on the decline

As consumers return to restaurants, they are feeling the strain of labor shortages across all types of establishments. Restaurant software and solutions provider HungerRush found that most consumers (51%) feel that independent restaurants have been impacted the most by not having enough staff to take orders, cook food and handle deliveries – followed by major chains (36%) and mid-sized regional restaurants (14%). With these shortages, friction points are increasing in the dining experience with longer wait times to receive food (33%), diminished customer experience due to overstressed staff (32%) and longer wait times just to place an order (17%) being among the top three pain points.

These points directly relate to the roles in which consumers felt were the most understaffed which included servers, counter staff (including drive-thru, phone and cashiers) and cooks. Creating an experience customers enjoy is crucial for restaurants, as 39% of people are likely to write a negative review after visiting a restaurant suffering from staffing issues, long wait times and order inaccuracy.

Consumers prioritize speed when placing an order with 91% saying the maximum amount of time they are willing to wait is three minutes or less. Twenty-five percent and 19% expect to place an order in less than two minutes and one minute respectively, demonstrating just how critical speed to order is to today's consumers.

When customers call a restaurant to place an order and can tell based on loud background noise that it is hectic, it impacts their overall experience. Fifty-seven percent of consumers aren't confident that a busy store will take their order correctly if they need to personalize or modify regular menu items. Moreover, 19% of consumers actively avoid making any order modifications if they can tell a restaurant is busy in the background.

Utilizing tools such as technology to adapt their models and decrease or eliminate wait times and improve order accuracy can help during these tough times. In fact, 72% of consumers said they would opt to use an automated phone bot to place an order depending on the situation.

The ebb and flow of seasonal staffing also creates more points of friction in the consumer experience when increased order inaccuracy (28%), longer times to order food (24%) and loss of personal connection with seasonal staff (12%) are felt by consumers.

This survey was commissioned by HungerRush and conducted by Dynata in May 2023 with 1,000 U.S. consumers aged 18 and older.

••• shopper insights

Inflation hits back-to-school shoppers

Nonessential purchases placed on back burner

Higher prices are weighing on many K-12 families as they prepare for the upcoming school year. In addition to a 23.7% increase in the cost of school supplies in the past two years (per the Bureau of Labor Statistics' Consumer Price Index), three in 10 (31%) parents say their households are in a worse financial situation than last year and half (51%) expect the economy to weaken in the next six months. According to business consulting and services company Deloitte, back-to-school spending is expected to decline to $31.2 billion this year.

Parents expect to spend $597 per student in grades K-12, down 10% from last year. Among K-12 parents, 34% are postponing nonessential back-to-school purchases, up from 31% in 2022. They are prioritizing school supplies while pulling back on technology and clothing. Spending on school supplies is expected to increase 20% year-over-year to $7.1 billion. Parents also plan to reduce spending on apparel by 14% year-over-year. Technology spending is set to decline 13% this year, as many parents purchased needed technology supplies during the pandemic to meet virtual or hybrid learning needs.

Over two-thirds of parents (68%) expect to spend the same or less on back-to-school year-over-year citing inflation as the reason why some plan to spend less and why others plan to spend more. Among parents spending less, 51% attribute it to reduced disposable income (up from 45% in 2022), while 75% of those spending more point to increased prices (up from 60% in 2022). More than three-quarters (77%) plan to use debit cards and/or cash for their back-to-school purchases this season, up from 72% in 2022.

Some parents plan to get an early jump on back-to-school shopping this year, with 59% of spending expected to occur by the end of July. Thirty-five percent believe better deals occur earlier in the season vs. 26% who believe they occur later. Forty-nine percent will research online before purchasing back-to-school products in the physical store and 55% will research retailers' return policies before buying items.

Consumers overwhelmingly cite mass merchants (80%) as their most preferred retail format, followed by online retailers (60%), off-price retailers (33%) and dollar stores (33%). Forty-six percent of shoppers plan to spend most of their budget at mass merchants. Only 34% of respondents say they often find lower prices online. As a result, 74% plan to shop in-store vs. 56% who plan to shop online for most back-to-school shopping. Two in 10 shoppers are undecided about whether to purchase back-to-school items in-store or online. Among online shoppers, 88% are willing to meet a minimum order value to receive free shipping. On average, consumers are willing to spend $32 on a minimum order value for free shipping. Six in 10 (59%) restrict their shopping to retailers with free returns and 68% prefer returning items in-store to avoid paying return fees.

As consumers look to protect their wallets, the percentage of parents planning to buy sustainable back-to-school products is down from 50% in 2022 to 35% this year (although slightly higher among Millennials at 38%). Nearly half (47%) of those who won't purchase sustainable products say they are not affordable. However, sustainable back-to-school shoppers spend 36% more than others.

Despite keeping an eye on their budget, many parents are willing to splurge for the right reasons. They say their child can convince them to splurge on clothing (57%) and tech products (56%).

Deloitte's back-to-school survey was conducted online using an independent research panel between May 26 and June 1 and surveyed 1,212 parents with at least one child attending school in grades K-12 this fall.

••• real estate research

Abandoning the traditional home-buying process

Millennials seek homeownership

Higher home prices and low inventory aren't deterring the younger generations from seeking homeownership. Digital mortgage services provider SurveyLink found that despite shifting market conditions, more than half (52%) of all respondents plan to consider buying a home. Of those, 61% are Millennials, 25% are Gen X, 12% are Gen Z and 2% are Baby Boomers.

Homeowners, especially Millennials, plan to take advantage of the increasing value of their homes. Forty-four percent of respondents plan to take out a home equity loan this year. Of those, nearly half (49%) of Millennials say they are likely to take out a home equity loan compared to 44% of Gen X, 41% of Gen Z and 12% of Baby Boomers. Seventy-three percent plan to use the money to make home improvements while 20% plan to use it to pay off debt including student loans.

Some home buyers however are abandoning the process altogether. Forty-nine percent say they considered buying a new home in the past 12 months but ultimately decided against it. Of those, Millennials led all generations at 58% compared to Gen X (24%) Gen Z (13%) and Baby Boomers (4%). Over half of the respondents (56%) believe the options were too expensive and 48% of those in the group said high mortgage rates were a main factor for pausing their home buying search.

While traditional home-buying methods continue to be used, respondents are considering alternative paths to homeownership. Forty percent would consider buying a home at auction but haven't done so yet. Of those, Gen X ranked the highest among all demographics at 46% compared to 39% of Millennials, 29% of Gen Z and 30% of Baby Boomers. Fifty percent of people considering purchasing a home at auction would use it as a primary residence, 23% would use it for rent income and 20% would fix and flip it.

More homebuyers want to leverage technology to improve the home-buying process. Convenience and ease of use (63%) and saving time (59%) prove to be the biggest benefits of using technology in the buying process, across age and gender. While 41% of Baby Boomers say technology did not play a role in their mortgage process, 77% say convenience and ease of use was the top benefit of using technology compared to 65% of Millennials, 65% of Gen X and 42% of Gen Z.

A combined 68% of respondents say they are "very willing" or "willing" to submit videos or photos of their homes for a virtual inspection, compared to a combined 13% who say they are "not very willing" or "not willing at all."

The 2023 ServiceLink State of Homebuying Report survey was completed online among a panel of respondents who purchased a home or tried to purchase a home in the past three years. A total of 1,000 respondents 18 years of age and older completed the survey and interviewing was conducted by Sago from January 7-13.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8 TOP CX/UX RESEARCH COMPANIES

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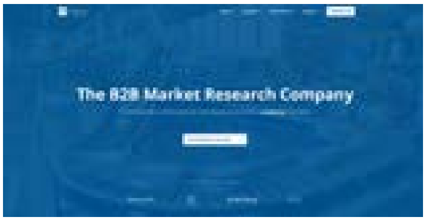

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Performance improvement experiments for CX research

| By Keith Chrzan

abstract

Traditional customer experience research grapples with the inadequacies of importance ratings and derived importance in assessing and enhancing performance. The performance improvement experiment emerges as a viable alternative, leveraging the method of paired comparisons to accurately measure attribute importance.

Customer experience (CX) research seeks to answer two important questions: How are we performing? How can we best improve performance? Answering the first question involves having respondents provide some overall evaluation of their experience like customer satisfaction (Westbrook 1980) or advocacy (Reichheld 2003). While both measures (and others) have their proponents, no one doubts the need for some sort of report card for the overall rating of the product or service.

As a way of answering the second question, importance ratings may come to mind. Widely used in the marketing research industry, importance ratings are easy to ask and answer and they require very little questionnaire real estate – for example, in one study respondents rated the importance of 10 items in only 38 seconds – so just under 4 seconds per attribute rated (Chrzan and Golovashkina 2006). Unfortunately, importance ratings perform poorly in terms of their validity. Even more unfortunately, many marketing researchers remain unaware of just how bad importance ratings are. I find this surprising, because a trio of papers published 40 years ago in the industry's premier academic journal, the Journal of Marketing Research, found that importance ratings not only have no predictive validity, they in fact have negative predictive validity when used to model preferences (Bass and Wilkie 1973; Beckwith and Lehmann 1973; Wilkie and Pessemier 1973). To bring this to marketing researchers' attention, Chrzan and Golovashkina (2006) replicated the earlier finding, again reporting that using importance ratings to weight attributes reduces the predictive validity of the resulting preference models.

To be fair, the CX industry largely moved away from asking stated importances a long time ago. Finding that they could be even more efficient with questionnaire real estate by doing away with respondent-provided importance measures entirely, CX researchers began deriving importances statistically instead. One derives importances by regressing attribute performance scores on the overall evaluation of customer experience (i.e., on satisfaction, intent to return, advocacy or an index of the three) and then using the regression coefficients as measures of importance. Unfortunately, deriving importance turned out not to be a panacea. Customer satisfaction ratings contain very strong halo effects (Thorndyke 1920).

A halo effect occurs when all of the attribute ratings are highly correlated with the overall rating and with each other: that is, in Thorndyke's memorable description, their correlations are "too high and too even." This pervasive psychological effect on the way people answer survey rating scale questions creates havoc with derived importances: whereas regression analysis requires that the predictor variables (the attributes) to be uncorrelated if they are to produce unbiased measures of importance, the halo effect violates this requirement. Worse still, Dawes and Corrigan (1974) and many others have found that uniform (equal) weights for all the attributes, or even random weights, often have more predictive validity than the importance weights that come out of a regression analysis. This is the final nail in the coffin of derived importance modeling.

In summary, we cannot rely on either importance ratings or on derived importance to help us prioritize attributes for improving customer experience. CX researchers need a better way to answer the second question above: How can we best identify the attributes to leverage to improve the customer experience?

I recommend PIE as that better way.

In a performance improvement experiment (PIE), we show a given respondent different subsets of attributes that might be improved and ask her which attribute, if improved, would most elevate her satisfaction with the product or service.

Take for instance Karl's Suites, a hotel chain serving business travelers. The first question in a PIE exercise for Karl's might be:

Which of the following, if noticeably improved, would most have made your stay at Karl's Suites better?

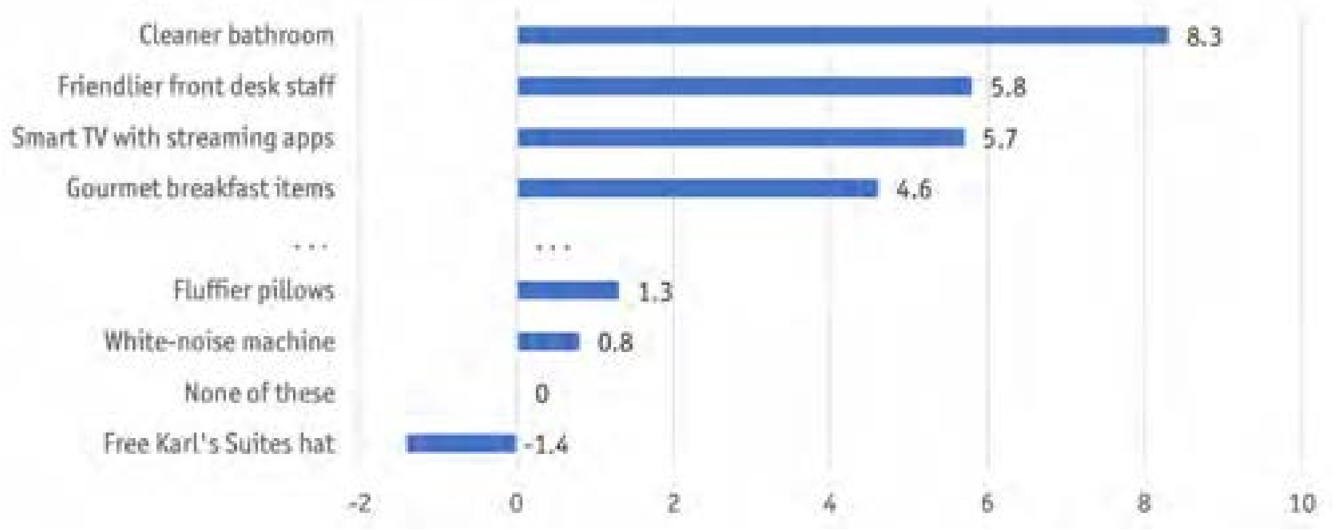
- ☐ *Smoother reservation process*
- ☐ *Easier to redeem rewards*
- ☐ *Cleaner bathtub*
- ☐ *Better lighting in the parking lot*
- ☐ *Less outside noise audible in the room*
- ☐ *None of these would have made my stay at Karl's Suites any better at all*

The next question might be:

Which of the following, if noticeably improved, would most have made your stay at Karl's Suites better?

- ☐ *Cleaner-feeling bedroom*
- ☐ *Better selection of foods at breakfast*
- ☐ *Better quality of food at breakfast*
- ☐ *More water pressure in the shower*
- ☐ *A white-noise machine on the nightstand to help me sleep*
- ☐ *None of these would have made my stay at Karl's Suites any better at all*

Figure 1: Improvement Potential



And so on for 10 or 15 or so such questions.

PIEs leverage the findings of Thurstone (1927), who showed that respondents can relate their preferences accurately if we ask them to make repeated choices among experimentally designed stimuli. Thurstone's work became known as the method of paired comparisons. PIE uses a multiple-choice extension of the method of paired comparisons. In fact, you can think of PIE as a type of best-worst scaling (or MaxDiff) question where we only ask for the best response. As such, you won't be surprised that what results from a PIE is a set of utilities or importances like you would get in a MaxDiff study (Figure 1).

One difference that separates PIE from MaxDiff is that we include a constant "none of these would have made my stay at Karl's Suites any better at all." This creates a utility threshold that separates attributes that matter to respondents (those above the "None of these") from those that don't move the needle at all (like "Free Karl's Suites hat" in the example in Figure 1). Typically, we scale the threshold to be the origin, or zero point, in the importance scale, so that the attributes capable of improving the customer experience have positive values and those unable to improve customer experience end up with negative utilities. Clearly this threshold aids in the interpretation of results.

Because of previous work done on the capabilities of MaxDiff, we know a lot about how to design performance improvement experiments and about asking and analyzing PIE questions.

First and most importantly, we know that MaxDiff does an excellent job of measuring attribute importance: Chrzan and Golovashkina (2006) found that MaxDiff outperformed five other methods for stated importance measures, two kinds of importance ratings among them, in terms of discriminant and predictive validity.

We also know that MaxDiff questions work better when they contain four or five attributes than when they contain more or fewer.

In addition, if we ask enough PIE questions so that each respondent sees each item at least three times, we can get good respondent-level estimates of attribute importance. For example, with 12 attributes, we can show them three times each by asking each respondent nine PIE questions, each containing four attributes plus the "none" threshold item. Respondents may get fatigued by repeatedly answering similar-looking PIE questions, so we don't usually recommend striving for respondent-level results with more than about 25 attributes (that is, about 15 questions of five attributes and a "none" each).

The original version of MaxDiff was made to work with individual-level analysis like this and PIE shares this extreme scalability: We can get good importance measures for individual respondents, entire populations or any subgroups of interest. That means that CX researchers can slice and dice the PIE importance results in any way required by their research objectives, without having to keep going back to rerun the model with subsets of respondents (as they would have to do if they derived importances via regression).

Moreover, we know from research on "sparse" MaxDiff designs that even if we don't show each attribute at least three times per respondent we can still get good sample-level or subgroup-level utilities by asking enough questions so that each respondent sees each attribute at least once (Chrzan and Peitz 2019). This means we could handle a PIE with 100 attributes by asking 20 questions each with five attributes and the "none." CX research doesn't usually require respondent-level importances, so we recommend this sparse-design strategy instead of requiring each item to appear three times per respondent, at least when we have more than 20 or so attributes.

Other MaxDiff design technologies (something called Express MaxDiff) may even produce good sample and subgroup-level utility estimates when respondents see attributes less than one time, on average, and, like the “sparse” design strategy in MaxDiff, these can be applied to PIE as well.

Of course, PIE does require some investment in questionnaire real estate: the PIE questions take respondents a bit longer to answer than do stated importance ratings (MaxDiff questions take about four times as long as importance ratings but PIE are simpler and should not take quite that long). CX researchers who want to know how to move the needle, however, should find this a small price to pay to get attribute prioritization they cannot get from importance ratings or from derived importances.

Sensitive and discriminating

CX researchers can avoid the serious problems that plague both stated importance ratings and derived importance analysis by using a performance improvement experiment. PIE involves experimentally designed questions which, upon analysis, produce extremely sensitive and discriminating measures of the attributes most able to improve the customer experience – the single most valuable goal of CX research. As a special case of MaxDiff, PIE shares many of the strengths of MaxDiff, namely its robustness and scalability, its flexibility, its familiarity to researchers and its implementation via readily available software.

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HOW RESEARCHERS CAN USE THE POWER OF 1, 2 AND 3 TO BOOST THE IMPACT OF THEIR COMMUNICATION

Nancy Cox takes a deep dive into the ways marketing researchers can improve the impact of their report-writing by harnessing techniques that use brevity, pairing and rhythm to capture and hold the reader's attention.

By Nancy Cox

While researchers are often described as "numbers people," in truth they wrangle both numbers and words. Just like writers. Writers wield the power of numbers almost invisibly – like magic creating a spell over readers: the undeniable impact of a one-syllable word, the story element of dualities or the rhythm of three-part phrases. Imagine if you had X-ray glasses that let you see these magic numbers at work underneath engaging and memorable writing. While there is no coupon for X-ray glasses at the end of this article, there are explanations and examples throughout it that will let you see how writers write by the numbers.

one

The writing number of *power*

Words. Sentences. Paragraphs. Each can be more powerful using the number one. Starting with words, one-syllable words are more powerful than multisyllabic words. This power goes beyond using simpler words. One-syllable words are survivors. In English, many one-syllable words are derived from Old and Middle English. As in before-the-Battle-of-Hastings-in-1066 old. They sound powerful as most have a consonant-vowel-consonant construction that crisps pronunciation.

Read aloud the word swaps below; breath and volume naturally drop at the end of the longer words. That drop weakens impact.

link vs. connection
start vs. activate
end vs. conclusion
rose vs. increased
fell vs. decreased

How can you quickly find the long words that could be weakening your writing? Use the proofreader hack of reading backwards. Without context, longer words stand out. Want to know if you're a habitual polysyllabic writer? Most writing software has a readability score function (also labeled Flesch-Kincaid) that reports a count of syllables-per-word.

To find a short word to replace the long word, look up the long word. Dictionaries use short words in definitions – those defining words can be strong substitutes. Online dictionaries also provide synonyms. Plus, dictionaries have the advantage over a thesaurus as dictionaries detail a word's language of origin. Look for the short synonym with Old English (OE) or Middle English (ME) roots. In the example word swaps above, all of the one-syllable words have Old English roots.

Playing games like Wordle is not only fun but it also builds your one-syllable word knowledge and counts as time spent on honing your professional writing skills! In a recent 30-day period, all but two Wordle words were derived from Old English or Middle English. Emphatic-sounding words like: grand, wrong, crumb, tract, frost, guard.

The power of one also applies to the last word in a sentence. A sentence's last word functions like the peak-end rule of consumer experiences. It lingers. The last word in survey or discussion guide questions is the springboard for respondents' answers. In an RFP, last words underscore decision-making and differentiating points. In a report, a bullet point's last word makes the point. Any word you would underscore or highlight is an ideal candidate for a last word.

The last-word rule can guide you on where to end a quote or verbatim in reports. Let your respondent have a strong last word rather than trailing off. While it may sound more conversational to present a quote this way: "When packaging changes color, that's confusing to me," editing it to "When packaging changes color, that's confusing" nails the point. Also, remember to format quotes so that the attribution is on a separate line in a smaller font, so visually the quote ends with a strong word from the speaker such as "confusing" vs. the attribution "Gen X shopper."

Don't be afraid to start a sentence and end a sentence with the same word. Example: "Price is the No. 1 consideration – shoppers trade convenience for price." Starting and ending with the same word creates an envelope sentence or epanalepsis. This repetition taps into primacy (first word) and recency (last word) in recall.

Using a strong last word also works for paragraphs. Try starting and ending a paragraph with that same word. Use the shortest word, preferably a one-syllable one. And don't sweat final-paragraph words when writing first drafts. Scanning paragraphs for strong last words is a quick but effective revision technique.

> **How can you quickly find the long words that could be weakening your writing? Use the proofreader hack of reading backwards. Without context, longer words stand out.**

two

The writing number of ***story***

Researchers often employ the magic number of two – methodologies that use paired choice or presentations with side-by-side insight comparisons, etc. Lurking within these familiar dualities are story elements:

- Opposing forces/choices where only one can win? In story, this is conflict.
- Cause and effect? In story, this is plot.
- Differences and similarities (i.e., compare and contrast) between target markets, brands, etc.? In story, this is character.

These story elements can be buried by showing every comparison in one chart. Certainly, there is a need and demand for the data in a detailed chart. Yet consider how an organization famous for detailed grid comparison charts, Consumer Reports, isolates a single conflict story to lure readers and to advance their recommendations. For example, in the Consumer Reports brief-recommendation article on best cars for teen drivers, the story is the conflict between safety and cost. Consumer Reports further ladders this POV to the most primal opposing forces – life or death. The reader gets the recommendation of how safety can triumph in almost every cost range and, if more detail is desired, a link to the robust chart.

How do you isolate these stories in research? Project deliverables often contain twosomes – launch or not; target market appeal or not; product/service used as expected or not; campaign A or B. You may need to boil down the jargon-filled wording of RFPs to find the dualities. Try this writer's craft secret: rewrite esoteric or bureaucratic language into an opposite voice. Adopt the voice of a terse, plain-spoken character. Think about the actor Clint Eastwood. How would one of his characters put an RFP or client brief into plain talk? After identifying the inherent dualities in deliverables, sort by duality type. Opposing force? Cause and effect? Compare and contrast? If the answer is that "all of the above" are stuffed in this project, lead with the opposing force conflict story. Humans attune to conflict stories as these stories teach us how to survive. How to win. This is why the Scripps National Spelling Bee changed its rules in 2021 to reduce the odds of co-champions. Thus, the triumph story of a single champion overcoming an opponent in a 90-second spell-off in 2022 vs. explaining how the rules allowed eight co-champions in 2019. Story is more engaging than explanation.

> Rewrite esoteric or bureaucratic language into an opposite voice. Adopt the voice of a terse, plain-spoken character. Think about the actor Clint Eastwood. How would one of his characters put an RFP or client brief into plain talk?

Some methodologies naturally yield results that march into a report two-by-two like Noah's animals: A/B testing; the family of conjoint research including MaxDiff; implicit association; forced-choice questions in surveys. Open-end question answers, however, may be more subtle in revealing dualities. Respondents' language yields some verbal cues when analyzing those answers.

Opposing forces/conflict verbal signals: winner/loser; torn between/forced to decide; trade-off/choice; had to pick/came down to; on one hand/on the other hand; versus and the simple word: or. Sports metaphors and battle metaphors, of course, also flag opposing-force dualities.

Cause and effect verbal signals: If someone shares an example story, often there is cause and effect. Read for temporal words or phrases: when, then, now, "I used to…" Also look for words projecting the future: hope, ideally, always, never, again, "in a perfect world," anticipate, "see it coming." Finally, humans link place with time, substituting where for when. For example, respondents may not mention a time word but instead describe cause and effect with a reference to a place – "I was at the store…" – before going on to describe a cause and effect.

To elicit more reflective cause-and-effect details during the research, include several flashback questions beyond "describe how you normally…" For example, in a holiday decorating ethnography study, the additional flashback question "What did you do to prepare for our visit?" helped to reveal if the décor was typical or altered due to the study visit. More importantly, that flashback question transitioned smoothly into probes about the cause-and-effect of holiday guests and decorating, prompting cause-and-effect stories of changes over time more specific than "Normally, I would…"

Contrasting people: Detailing differences in target consumers is the bread and butter of many reports. The writer's craft secret is to acknowledge the contrast between research respondents and stakeholders. Writers know that a reader is evaluating every character, even subconsciously: "Is this character like me or not like me? Is this how I would behave or not?" Stakeholders do the same. Consider using a writing technique of charting research respondent (character) in one column, then the stakeholder (reader) in a second column. What is shared? What is different? Use the tremendous advantage that researchers have over writers in that researchers know much, much more about stakeholders than writers know about their readers.

Differences make respondents intriguing. Without differences there is the risk of stakeholders feeling "I could have told you that without doing all this research!" Similarities make respondents relatable. Without similarities, there is the risk of stakeholders thinking "Who are these oddballs?" Beware if respondents come off as a better person than stakeholders. Share the character flaw or vulnerability that makes them human. (This is why the most compelling superheroes have Achilles' heels, express doubts or dread contact with kryptonite. Despite their abilities, they're still a bit like us!) Does the research participant come off as someone the stakeholder would rather not associate with? Find something the stakeholder sees as a redeeming quality. A popular series of books on writing describes this redeeming quality as the moment when an unlikable or unrelatable character "saves the cat." For example, there may a judgment among stakeholders about Walmart shoppers. Show them how a Walmart customer is shopping there because it's the only store selling baby formula that is open when she finishes her work shift at 11 p.m.

three

The writing number of *rhythm*

The rule of three is to writers what the Fibonacci sequence is to nature. Threes are embedded in writing. Three bears. Three wishes. Three acts in a play. Three beats in humor. Writers spend so much time with threes that guidelines have emerged that help them juggle them – again, almost invisibly like the juggler, so that attention is on the three items not the juggler's (or writer's) hands.

A classic (so old-school it has a Greek name – hendiatris), it is the writing technique that emphasizes the same point three times. Such as the answer to the three most important things in real estate: "Location. Location. Location." And 2023 will be summed up: "AI. AI. AI." Perhaps you can express the decision-making process of your B2B research as: "Budget. Budget. Budget."

A variation is using three very closely related words or synonyms. Examples:

Snap! Crackle! Pop!
"Friends, Romans, countrymen…"
Every Tom, Dick and Harry.
In no way, shape or form.
Dollars. Cents. Budget.

Hendiatris is not limited to headlines or slogans. This repetition of three can be used in a twist on forced-choice questions. In this imaginary example, a researcher for the snack, Snacklepuffs, pipes the consumer's top five answers from a lengthy attribute list of Snacklepuffs. The question then reads:

On a billboard for Snacklepuffs, what should be the headline? (select one only)
☐ *Cheese. Cheese. Cheese.*
☐ *Crunch. Crunch. Crunch.*
☐ *Salty. Salty. Salty.*
☐ *Red Bag. Red Bag. Red Bag.*
☐ *Happy Times. Happy Times. Happy Times.*

More often, research yields more than a single, repeatable idea. Perhaps the Snacklepuffs research revealed three equally important differentiating attributes for Snacklepuffs:

- Grilled cheese sandwich flavor
- Reminds fans of happy memories with a bag design that has not changed
- Crunchiness lasts over several days after the bag is opened

The rule of three is to writers what the Fibonacci sequence is to nature. Threes are embedded in writing. Three bears. Three wishes. Three acts in a play. Three beats in humor.

How would a writer juggle those three items for maximum reader retention? First, write all three items in parallel structure. Parallel structure makes it easier for the reader to take in the key points – it reduces the cognitive load. In the example below, the structure is noun-verb-modifying phrase.

- Flavor tastes like a grilled cheese sandwich
- Bag brings happy memories
- Crunch lasts days after bag is opened

Reviewing the open-ends again, the imaginary writer/researcher notices consumers using the word "same" repeatedly and writes a new threesome incorporating the word "same."

- Flavor is the same as a grilled cheese sandwich
- Bag is the same bag from childhood
- Crunch is the same days after bag opened

Looking at the second choice, there's an overarching theme emerging. Aha! A theme that Snacklepuffs stays the same. Suggesting this headline:

"Snacklepuffs are differentiated by what stays the same: flavor, bag design, crunch"

Further revising, layer another writing-craft secret on that headline to order the three items to be more memorable. Three options to try: order by length, difference and sound.

Option 1: Order by syllable length. In this example, there is a natural build from one syllable to two syllables to three. Or the reverse makes a pattern of three to two to one.

- “Snacklepuffs are differentiated by what stays the same: crunch, flavor, bag design”
- “Snacklepuffs are differentiated by what stays the same: bag design, flavor and crunch”

Option 2: Which item is different? Order with the “odd man out” as the last item.

- Healthy, wealthy and wise (the only one-syllable word is last)
- Faith, hope and charity (the only polysyllabic word is last)
- The Nina, the Pinta and the Santa Maria (the only two-word name is last)
- Life, liberty and the pursuit of happiness (the only phrase is last)

The Snacklepuffs headline could order the only phrase last or the one-syllable word last.

- “Snacklepuffs are differentiated by what stays the same: crunch, flavor, bag design”
- “Snacklepuffs are differentiated by what stays the same: flavor, bag design and crunch”

Option 3: Which order sounds best when read aloud? In this case, it’s crunch. The onomatopoeia of crunch works like an exclamation point. After reading aloud, the winning headline has a rhythm of three, two to one syllable, with the bonus of a last word satisfying as a Snacklepuff.

- “Snacklepuffs are differentiated by what stays the same: bag design, flavor and crunch”

Now that the Snacklepuff threesome is in a strong order, one final writing-craft option is the conjunction. Try adding “and” between each of the three items.

- “Snacklepuffs are differentiated by what stays the same: bag design and flavor and crunch”

Feels a bit pompous for Snacklepuffs but for another topic, this repetition may add lyricism and gravity.

It’s your turn

While not quite as easy as having X-ray reading glasses, these techniques and examples demonstrate how writers use numbers. Now it’s your turn. Scan your writing for the power of one-syllable words and last words. See how dualities add the story elements of plot, conflict and character. Track how the rule of three adds rhythm to the words. You’ll be on your way to crafting communication that enlightens, engages and informs.

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

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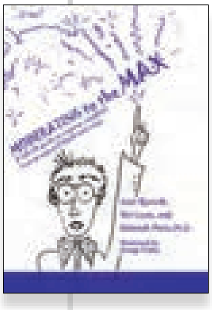

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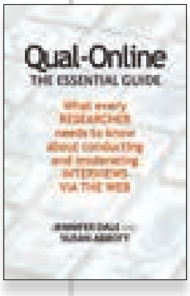

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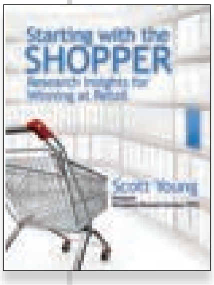

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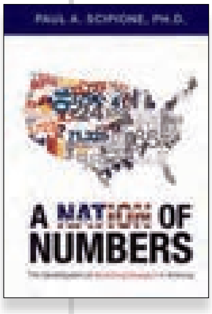

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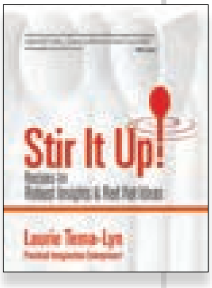

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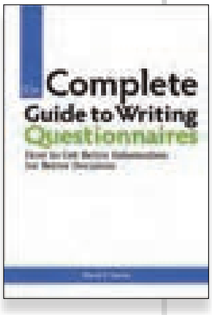

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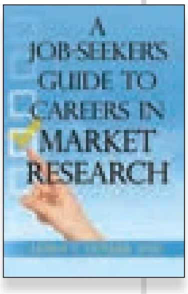

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••• segmentation

Less art, more science, please

Adding machine learning to the segmentation process

| By Westley Ritz

abstract

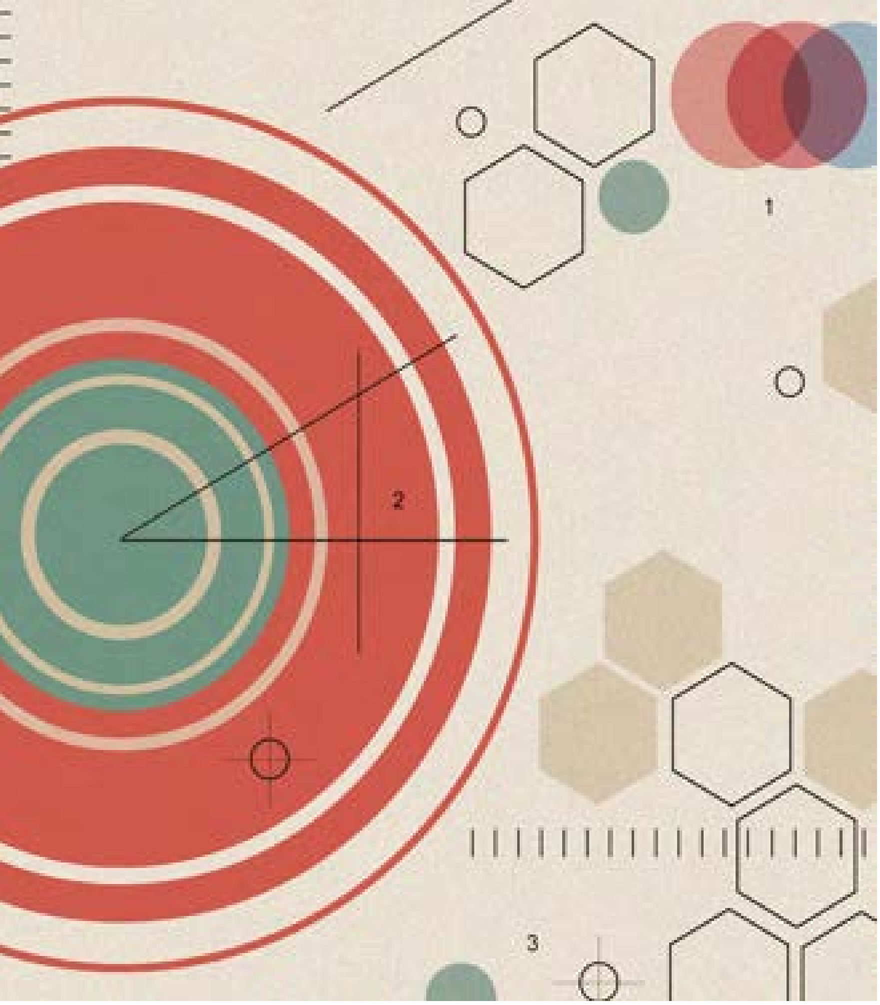
Traditional segmentation analysis often relies on a mix of scientific techniques and artistic intuition, leading to suboptimal and inefficient outcomes, the author argues. By integrating machine learning methods, researchers can reduce human intervention and improve accuracy.

“It’s part science and part art.” I suppose this appraisal can be applied to many areas but within traditional market research, it may as well be the unofficial slogan for segmentation analysis. A segmentation project is typically a large undertaking for a firm, with the goal of identifying unique groups of consumers to guide and support business decisions. The process is lengthy and has many stages, typically a mix of statistical techniques and practitioner intuition. This heavily blended science-and-art approach, particularly applied to the analysis itself, was prominent when I started my career 20 years ago and it still is. But should it be so?

Though not new, machine learning (ML) techniques are scientific approaches that have recently gained significant traction in market research. When applied to segmentation studies, these approaches can systematically replace dependency on researcher intuition. That’s not to say that genuine opportunities for artistic expression don’t exist in market research. Graphically representing data or creating engaging and thought-provoking survey instruments are a couple such examples. But when it comes to segmentation analysis, there are several instances where the process is labeled as “art” simply out of convenience, or more frankly, as an excuse for not having a better scientific approach. And in the absence of sound statistical methodology, an intuitive judgment is made.

To start, consider the segmentation process as shown in Figure 1, here broken into three parts: 1) identifying the project scope and related dimen-

Figure 1



sions to test; 2) analysis and formulation of segments; and 3) presenting and distributing the resulting segments for company adoption.

The initial phase of a segmentation project is admittedly highly artistic. The goal is to establish the dimensions or themes that should inform and differentiate the segments, which is done by understanding the objectives, purpose and intended use of the project results. Instead of analysis, this stage is ripe with discussions, interviews, interpreting what is known and unearthing what is unknown. Researchers may hold brainstorming sessions, conduct stakeholder interviews, review past research, examine known company and industry metrics or conduct qualitative research. And upon thoughtfully determining these dimensions, the task of capturing the necessary information may proceed.

And, skipping to the last phase, the derived segments are brought to life through art. The metrics and mean values that describe each segment are transformed into plain-English descriptions. Personas to represent each segment are built for executives to relate to and quickly grasp how they may or may not reach that consumer. And action plans are distributed to company departments with direction for implementation on how to engage with consumers based on those personas.

Unlike the front and back ends of segmentation, which are rightfully artistic, the middle stage of analysis and segment formation is ripe for scientific methods. However, researchers may not be taking advantage of all the techniques at their disposal, which would reduce the need for human intervention and result in better outcomes. Here are a few specific instances from the analysis phase that are commonly labeled as artistic:

- Arbitrarily removing or adding variables upon review of the initial segmentation output and rerunning the analysis until an acceptable solution is found.
- Subjectively picking a single solution from many options after running the analysis multiple times via various methods and number of clusters.
- Actively tailoring a predictive algorithm for classifying outside respondents (aka typing tool) to ensure the so-called opportunity segments have a high degree of accuracy, often at a cost of sacrificing the accuracy of the other segments.

While the above attempts may ultimately yield an acceptable solution, chances are it's suboptimal and certainly is inefficient. And the reality is that superior scientific approaches do exist. With the rise in popularity of ML techniques, due to increased computational power, accessibility and awareness, these methods can and should take a larger role in analytical processes. To demonstrate the advantages of applying these methodological procedures, the remainder of this article looks at three different phases of a typical segmentation process:

- variable selection for analysis;
- performing the segmentation analysis; and
- creating a predictive algorithm for typing future respondents

Variable selection

The old adage "Garbage in, garbage out" couldn't be truer than when applied to segmentation. Poorly chosen or improperly coded variables will ruin any chance of developing useful results. What is required for successful implementation has been well-documented: low redundancy or low multicollinearity,[1] a high degree of discrimination or variability, and variables which are actionable and represent dimensions we desire the segments be built around. As mentioned, only that last piece is art since it requires careful collaboration and discussion with the client to identify the proper variable dimensions for consideration. The rest, all science.

Thankfully, there's no longer any need to guess at variables, run the analysis and then iteratively remove or include variables based on the outcome (low differentiation or unidimensional segments). Rather, there are methodologies to discern both unique and discriminating variables prior to segmentation. Two popular R packages for variable selection are clustvarsel[2] for continuous variables and the VarSelLCM[3] package for a mixture of continuous and categorical data types. Both are model-based approaches, utilizing information criterion statistics, to determine the optimal

Figure 2

selection of variables. As depicted in Figure 2, these models use the proposed segmentation variables (the initially defined dimensions) as input, and upon specifying a threshold, they efficiently output the ideal variables to take forward into analysis.

Segmentation methodology

After rigorously extracting a quality set of variables to proceed with in analysis, now is not the time to let up on the scientific process. And so, gone are the days of running multiple solutions via different techniques and choosing the solution that simply "reads" the best. Sure, different applications will result in different outputs but we should be harnessing that reality, not being bullied by it. While admittedly there isn't a one-size-fits-all solution to every project, ensemble methods are an effective approach well-suited for many segmentation applications in market research.

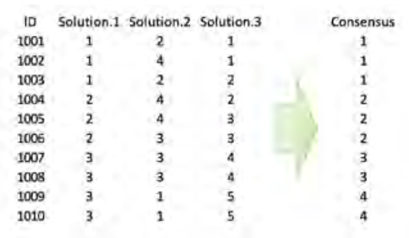
Ensemble techniques are popular in ML, with the ability to be applied to many different methodologies. In regard to segmentation, ensemble analysis takes as input the classifications of many segment solutions. These are produced via varying procedures and include different numbers of clusters. (While the example in Table 1 depicts only three solutions, in practice this number will be much higher, closer to 40 or more.) Then the ensemble looks to cluster across them all to reveal a consensus solution, one that is more stable, reproducible and leads to higher prediction accuracy. And as a bonus, the process is also more efficient as time isn't spent sifting through many solutions and attempting to pick the one that feels best. While several applications exist, an open-source option is the R package diceR.[4]

Typing tools

The crux of market research centers around causal inference, understanding the "how" and "why" to guide business decision-making. And the technical approaches outlined so far put researchers in the best position to elicit these crucial insights. But as part of making a segmentation analysis actionable, future consumers need to be classified into the established segments to guide messaging, sales and general interaction. Therefore the main goal of algorithmic typing tools is prediction accuracy.

Traditional approaches to typing respondents, such as discriminant analysis or rule-based heuristics, suffer from a lack of generalization, making them unreliable and inaccurate once you test beyond the source dataset. And often, the researcher is left manually iterating subsets of variables to reveal an acceptable solution. Instead, ML techniques were developed to overcome these issues. Table 2 shows an example from a segmentation in the online instant delivery industry, comparing the accuracy of discriminant analysis against an ML technique called a support vector machine (SVM). Note in five of the seven segments, the accuracy of predicting which segment holdout respondents belonged to increased 10% - 44%, and the overall accuracy increased 14%.

Table 1



ID	Solution.1	Solution.2	Solution.3	Consensus
1001	1	2	1	1
1002	1	4	1	1
1003	1	2	2	1
1004	2	4	2	2
1005	2	4	3	2
1006	2	3	3	2
1007	3	3	4	3
1008	3	3	4	3
1009	3	1	5	4
1010	3	1	5	4

Table 2

		Accuracy		
Segment	Size	Discriminant	SVM	Change
1	20%	85%	100%	18%
2	13%	85%	94%	10%
3	15%	70%	87%	24%
4	19%	100%	100%	0%
5	13%	98%	88%	-10%
6	12%	79%	99%	25%
7	7%	67%	98%	44%
		84%	96%	14%

In fact, even more-accurate models could be developed via deep learning ML algorithms utilizing neural networks but they are usually impractical for our purposes. Neural nets, while powerful, don't lend themselves to a plug-and-play application due to their complexity. And typing tools are just that, a deliverable tool that anyone can utilize. Simply plug in the responses of a new respondent and the result is a prediction of which group they belong to. So instead, shallow-learning algorithms like SVM are recommended because they are still highly accurate and also perform well as a deliverable tool (programmed in Excel for example). SVM models are available via the svm function in the R package e1071[5] or through a few different Python libraries.

Less guesswork, more confidence

There will always be a need for art (creativity and thoughtfulness) in the market research profession. As demonstrated here, utilization of the soft sciences and artistic expression is essential for brainstorming and communication. But when it comes to data analysis, it shouldn't be the fallback or catch-all when quality data-driven methods are at our disposal. Instead, embrace ML to tease the most out of the data, allowing science to play a prominent role in supporting derived business decisions and recommendations. There will be less guesswork in the process, more confidence in the output and greater value provided to clients. Q

Westley Ritz is director of analytics at TRC Market Research. He can be reached at writz@trchome.com.

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••• dei research

Everyone wins

Minnesota study highlights the positive DEI impacts of enhancing employment opportunities for people with disabilities

| By Tom Pearson

abstract

Recent qualitative and quantitative research emphasizes the importance of government involvement through public and private sector partnerships and the need for flexibility and accommodations in hiring processes for people with disabilities.

In this article we share the findings from qualitative and quantitative research conducted among employers in Minnesota earlier this year which uncovered surprising insights on the positive effects that people with disabilities in the workforce have had on their fellow employees and the companies they work for. The insights show how an exemplary public and private sector partnership is resulting in broader societal benefits from enhancing diversity, equity and inclusion (DEI) for people with developmental disabilities.

The Americans with Disabilities Act (ADA), signed into law in 1990, is a comprehensive federal civil rights statute protecting the rights of people with disabilities. It has had a major impact on access and inclusion to employment opportunities for people with disabilities, which in turn has greatly enhanced their chances for equity and inclusion in society in general.

Title I of the ADA applies to employers with 15 or more employees. It prohibits discrimination in recruitment, hiring, promotions, training, pay, social activities and other privileges of employment. It restricts questions that can be asked about an applicant's disability before a job offer is made. It also requires that employers provide "reasonable accommodations" to the known physical or mental limitations of otherwise qualified individuals with disabilities, unless it results in undue hardship.

Two phases of research were completed among employers in Minnesota in the first quarter of 2023:

Phase I: Qualitative research was conducted to gather knowledge and experiences to inform the design of a quantitative survey of employers:

- In-depth interviews (IDIs) with subject-matter experts in state government and the private sector (n=6).

- In-depth interviews among employers of individuals with developmental disabilities (n=10).
- Each IDI took 40-50 minutes to complete and was conducted using a web-based audiovisual platform, enabling representation from of a wide variety of industries and locations from around the state.

Phase II: Quantitative survey of businesses in Minnesota, n=200, from an opt-in panel of business managers. Research objectives:

- obtain measures of current employment of people with developmental disabilities and other disabilities;
- gauge employers' attitudes regarding employment of people with disabilities;
- gain insights regarding the future outlook for employment of people with disabilities.

Among employers in Minnesota, at locations with five or more employees, two-thirds employ people with disabilities, the majority of whom (eight of 10) have a developmental disability. These companies tend to be much larger and more likely to be involved in retail trade or manufacturing, compared to those that do not currently employ people with disabilities (Figure 1).

One hypothesis we had going into this research was that companies were motivated to employ people with disabilities, more today than in the past, simply because of the historic shortage of workers after the pandemic. However, we found that more important reasons were having a company culture that embraces diversity and a workforce that matches the profile of people in their communities (Figure 2).

Some employers are hesitant to employ people with disabilities simply because of fear of the unknown. Concerns were expressed during the research by subject-matter experts about the potential complexities of employing, managing and working with people with disabilities.

Figure 1: Employment by Type of Business/Industry

Type of Business, Industry	Have Employees with Disabilities (n=138)	Do NOT Have Employees with Disabilities (n=58)
Retail Trade	21%	5%
Manufacturing	19%	3%
Health Care and Social Assistance	13%	9%
Finance and Insurance	10%	3%
Information Tech and Services	9%	5%
Professional, Scientific, Tech Services	7%	47%
Construction	5%	3%
Accommodation and Food Service	3%	2%
Educational Services	3%	2%
Transportation and Warehousing	2%	3%
Other	1%	7%

Figure 2: Reasons for Employing People with Disabilities

Not at all important		Somewhat important		Very important
1	2	3	4	5

How important were each of the following reasons why your company has hired someone with a disability? Q16 (n=138)

	Mean Ratings
It fit the values of our organization, our company culture	4.3
We wanted to represent the diversity of our community within our workforce	4.2
I myself, or someone else in my organization has had personal experience with individuals with disabilities	3.9
A shortage of workers in Minnesota, exacerbated by the pandemic, attracted us to people with disabilities, a relatively untapped labor pool	3.5

> *They're scared, right? Like, "I don't know how to manage that person. I don't know how to talk to that person." So, there's kind of a fear factor that nobody would admit to.*

Current non-employers of people with disabilities are most concerned about senior management reactions to their hiring decisions, as well as concerns for safety and costs of employing people with disabilities.

Government involvement is essential

Among the population of people with developmental disabilities, no two individuals are alike, as they cover the full spectrums of cognitive, social and emotional skills and abilities. Consequently, government involvement is essential in helping individuals with disabilities find the best fit among potential employers and coaching them through the application and onboarding processes.

In addition, many company managers lack experience in working with people with disabilities, which explains why 57% of the businesses that employ people with disabilities were assisted by Vocational Rehabilitation Services (VRS) from the Minnesota Department of Employment and Economic Development (DEED), and many were assisted by other government and non-government employment services. One company respondent had this to say about VRS:

> *I'm not a special ed teacher, I don't have the training. I partner with Vocational Rehabilitation (Services); they have the understanding. They come into my business and learn what we need. It's scary, but partner with an expert and they'll help with the process.*

Need for flexibility and accommodations

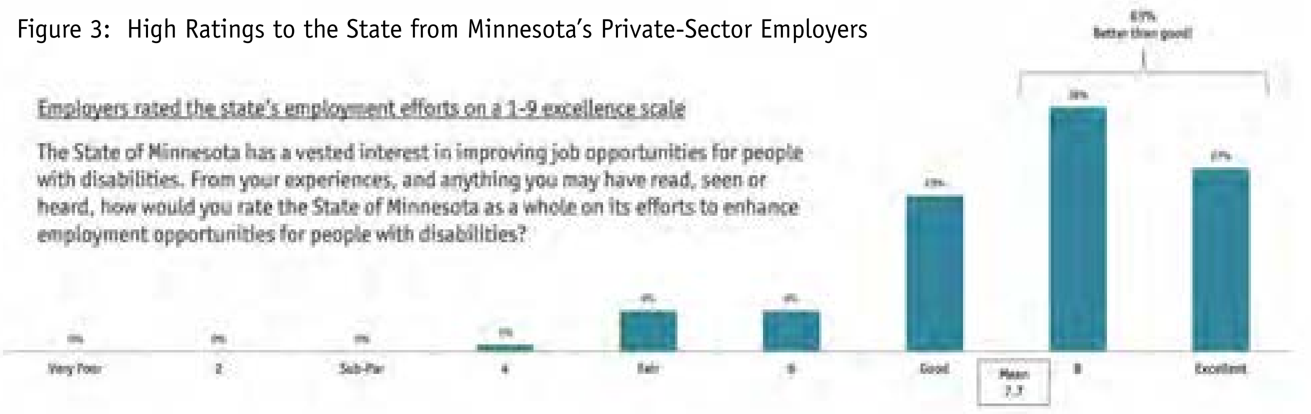
Flexibility in hiring processes is often required of companies that employ people with disabilities. An experienced employer of people with disabilities said this:

> *Our hiring process is maybe slightly modified depending on what the candidate needs … If somebody needs their job coach to come along with him to the interview, that's completely fine. If there's some other assistance that they need, we talk through that before the interview process.*

Some companies are able and willing to customize job descriptions to fit the needs of the employee. For example, they may split some job tasks into part-time positions in order for the employee to maintain eligibility for assistance they may be getting from the government:

> *Some of the people [we've hired] were getting some sort of assistance, [which means] they can only make so much money. We ended up shortening up hours to make sure they never made more*

Figure 3: High Ratings to the State from Minnesota's Private-Sector Employers



> *than what they could. And what happened a lot of times is that they could make more money working than they were getting for assistance. So, they would drop the assistance and just want to keep working; and either was fine with us.*

However, that level of customization is not doable in companies that need more consistently defined hiring protocols:

> *Customized employment is an awesome concept but to [some] employers it sounds like you're creating a brand-new job, which can be a very scary prospect. Like what is that job, who do they report to? How does that work? Why are we creating a new job? We can't just put new jobs together willy nilly, without vetting from our legal team and having an appropriate business need.*

Title I of the ADA requires that employers provide "reasonable accommodations" to the known physical or mental limitations of otherwise qualified individuals with disabilities unless doing so results in undue hardship. Just over half of the employers in our survey have needed to provide some forms of physical and/or process accommodation for their employees with disabilities. The most often provided forms of accommodations were as follows:

Physical accommodations

- Provided technology to help the employee function in the workplace (such as voice recognition software or a specially designed computer keyboard)
- Modified physical environment (ramps, adapt desk to wheelchair)
- Provided accessible parking

Process accommodations

- Allowed employee to work from home
- Changed pre-employment screening procedures
- Provided transportation accommodations

Half of the accommodations made for people with disabilities cost their employers less than $1,000; about a third (35%) cost between $1,000 and $5,000. Though costs were more than anticipated for 28% of employers, only 3% believed the costs of accommodations outweighed the benefits of employing people with disabilities.

Valued and appreciated

Employers appear to be equally satisfied with employees with disabilities as they are with their employees without disabilities but for different reasons. Employees with disabilities are valued and appreciated for their positive attitude, loyalty and impact on other employees and their companies as a whole.

> *The most amazing thing I saw was the complaining almost stopped from my current employees. It was unbelievable. They got to see how important it was to somebody else. It changed the whole attitude and people became very accepting, very forgiving, very understanding. It was amazing to see how my own people changed for the better when we started doing this.*

Exemplary partnership

Towards the end of the survey the employers gave very high ratings to the state, illustrating the exemplary public/private sector partnership that exists in Minnesota for enhancing employment for people with disabilities (Figure 3). Professionals from DEED, along with its partnering organizations, work directly with businesses to help them find the right candidates, resulting in successful employment for people with disabilities. If contacted by DEED or one of its partnering organizations: 90% of companies that currently employ persons with disabilities would be likely to pursue hiring others; and among employers that currently do not employ people with disabilities, 70% would be likely to pursue that possibility if contacted by DEED or one of its partnering organizations.

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••• qualitative research

A good connection

The advantages of phone IDIs for qualitative research

| By Len Ferman

abstract

Telephone in-depth interviews are cost-efficient, provide enhanced value and are effective across various target audiences and industries. In addition, their one-on-one nature can lead to higher-quality data by boosting respondent engagement and rapport.

As a qualitative researcher for over 30 years and a fan of innovation, I'm continually searching for new ways of collecting data for customer insights. Yet over the past decade I've migrated to and found great success with a remarkably simple – and borderline old-fashioned – approach to conducting qualitative research: telephone in-depth interviews, which are usually referred to as phone IDIs.

Phone IDIs deliver superior value to clients while also creating a vastly improved respondent experience (RX). In this article, I will attempt to convey the myriad benefits this approach offers for qualitative research.

What are phone IDIs? Phone IDIs quite simply involve holding a phone conversation between a qualitative researcher and an individual respondent. They hearken back to the pre-internet days when the telephone was the primary tool for data collection for most market research and thus may seem antiquated in this digital age. Yet the benefits of phone IDIs are so compelling that my clients nearly always agree to this approach once I present the case for it.

Why? In one sentence: Phone IDIs can be cheaper, faster and better than other forms of qualitative research. This may sound unbelievable given that a survey of qualitative research methods recently indicated that less than 2% of all qualitative research was conducted via phone IDIs. What seems more unbelievable to me as a practitioner is that so little qualitative research is presently using this method.

Here are the benefits:

Superior sampling. Respondents for phone IDIs can be anywhere in the world. This enables researchers to construct purely random samples, a stalwart characteristic of sound research. Traditional in-person focus groups, in stark contrast, only allow for respondents to be recruited from a close geographic proximity to one or several focus group facilities. By definition this obliterates any attempt to draw a random sample.

And while online research methods theoretically contain the built-in advantage of reaching people anywhere, there can be severe limitations due to technological comfort of respondents. Many older respondents are still intimidated by technology. And with the ever-increasing need to be conscious of cybersecurity, many younger respondents may be wary of participating in online research.

Better respondent experience. Over the years I have become increasingly concerned about the quality of the respondent experience. RX should be considered as a critical factor to ensure quality data-gathering for all market research. In my experience, respondents are most likely to provide high-quality, honest input when they feel 100% comfortable sharing their feedback.

Phone IDIs contribute tremendously to achieving an outstanding RX. There is nothing quite as simple and safe for the respondent as just answering their phone for a scheduled phone IDI. The respondent is relaxed and ready to engage. Other methodologies introduce an element of the unknown which can put respondents on edge. Focus group facilities, no matter how inviting, are an unfamiliar space for any first-time attendee. And online platforms can often be daunting even for technologically savvy people.

Complete respondent engagement. The old adage “garbage in, garbage out” applies to customer research when we consider the engagement of respondents in a study. I am always concerned about whether I have 100% engagement of the respondent because I only trust the data when I know the respondent provided their full attention. In this age of multitasking, it is easier than ever for respondents to only give partial attention to a task. For this reason, I can’t be confident with the engagement of respondents in online research. I just don’t know how focused they are when answering questions.

Even in-person focus groups are subject to lack of engagement because individuals in the room may tune out when the qualitative researcher is speaking to one of the other respondents.

When I’m conducting phone IDIs I have 100% respondent engagement. There is no one else participating and so it is quite clear whether the respondent is providing their full attention. Even if I can’t see the respondent, I know I have their engagement if they are responding to my questions thoughtfully.

Stronger rapport. Since phone IDIs involve a live one-on-one conversation, in a comfortable environment, it is more likely that the qualitative researcher can establish a strong rapport in comparison to in-person or online group research or any form of online text-based research, helping participants open up when sharing their feedback. This is critical to the success of qualitative research projects and paves the way for reaching respondents’ root problems or motivations.

Improved probing. As a result of a stronger rapport, phone IDIs are a great opportunity to fully probe with the respondent on a topic. Unlike in-person or online focus groups, where the qualitative researcher must always try to equally engage all respondents during a session, phone IDIs, by their nature, let the researcher get to the bottom of any topic with as many follow-up probes as it takes to fully understand the respondent’s thinking. Both the comfort level of the respondent and the one-on-one nature of the research contribute to phone IDIs’ high potential for revealing the key underlying issues. Phone IDIs also avoid the probing problems associated with online text-based sessions, where respondents either don’t reply to the probes or offer scant responses.

Insight into the customer journey. In designing qualitative research, I always try to think in terms of understanding the customer’s journey. I want to be able to tell the clients the story of each individual respondent. I can only do this when I’m fully engaged with a customer in a one-on-one setting. Phone IDIs allow me to follow a line of questions with a single respondent so that I can reach the point where I feel I fully empathize with their experience. Focus groups don’t allow the qualitative researcher to probe enough with each person in the room to put together a holistic picture for any one of them.

Easier client listening. I always encourage clients to listen to respondents live when possible but, given their time demands, this is not always feasible. Fortunately, phone IDIs are easily recordable with high-quality audio that can usually be shared immediately following the interview. Instant transcripts are another feature that can be provided with phone IDIs. Focus group facilities, in contrast, can have audio that can be difficult to hear and transcripts and audio are not usually available right away.

Enhanced ability for client input. I have found over the years that no matter how well prepared we are, when embarking on a qualitative research project, we cannot predict how well the topic guide will work until we have conducted the first couple of sessions. The advantage of phone IDIs is that we're not limited to just a few sessions as is frequently the case with focus groups. If for example we have a study that has four focus groups, we may be 50% done with the fieldwork before we have a topic guide that's optimal. In contrast, phone IDIs usually involve conducting a larger number of sessions, thus providing little concern if the guide needs to be modified after the first couple of interviews.

In fact, I always include in my process a client debriefing after two or three interviews for the express purpose of making any refinements to the topic guide. This provides an added advantage of ensuring early client engagement in the project, which further increases the likelihood of overall project success.

Lower cost. In an age where budgets are of the highest concern, there is perhaps no more prominent advantage for phone IDIs than their cost-efficiency, thanks to there being virtually no cost besides the researcher's time to implement them. I have generally found that the cost of eight phone IDIs is equal to one in-person focus group. And eight phone IDIs are sometimes enough for a study that is limited to a single segment, whereas you would never conduct just a single focus group for any qualitative research study.

Improved value. In addition to lower cost, the larger quantity of phone IDIs provides greater opportunity to gather unique data points. A typical project might include 20 to 30 phone IDIs as opposed to six to eight focus groups. In addition, the quality of the data can be greater because it is uncluttered by the complications that come with multiple people providing input in a focus group.

There is also superior value in terms of the overall research investment being made by the client. More sessions allows for more opportunities to modify the topic guide and explore emerging and unexpected themes that may be uncovered in the initial interviews. Phone IDIs make it easy to pivot as needed. To enable this, I purposely space out the interviews to allow for maximum client input during the course of the fieldwork. In this manner, I'm facilitating the client's ability to have a journey with their customers and optimize the investment they're making in the research.

Best practices in conducting phone IDIs

In conducting phone IDIs I adhere to several best practices. When possible, I try to conduct the scheduling interviews myself. This way I am establishing a rapport with the respondent prior to the interview. They know me and my phone number before the interview takes place.

When it comes time to conduct the phone IDI, I call the respondent directly. There is nothing simpler for the RX than just having to answer your phone to participate. I don't want the respondent to even have to dial into a bridgeline. I want them to feel comfortable and hear a familiar voice on the line.

I also use a reliable phone conferencing system that can automatically record the call with high quality and offers a machine transcript. The conferencing system allows me to put all the clients automatically on mute. Whether clients dial in early or late or leave in the middle of the interview, they will not be noticed by the respondent. This is a requirement to maintain a good RX.

In addition, when I call the respondent for the interview, I'm also bridging them directly into the conference system, thus taking that step away from the respondent in the spirit of making them feel comfortable and setting up the optimal RX.

After the call is completed, I download the recording and transcript immediately and make these available to the client.

Finally, because I'm getting high-quality audio, I'm able to provide audio clips of key points in my reports so that the big insights are supported by the actual voice of the customer. This creates highly impactful and actionable insights presentations.

Effective across many audiences

Many people have asked me whether there are any respondent or customer segments for which phone IDIs work particularly well or simply don't work. The quick answer is that in my practice I have found they work well with every target audience for which I have implemented the approach.

I have conducted phone IDIs with respondents aged 18 to 80, in B2C or B2B research and across a wide array of industries. I have used this methodology in interviews ranging from senior executives to consumers of financial services to golf fans.

From my experience with phone IDIs I feel they work in every scenario. The only reason I would hedge and say that they work with "nearly" any target audience is because in my practice I simply have not conducted any work with minors under age 18.

I believe the reasons this methodology works so well across age groups, industries and sales scenarios are that it's simple, familiar and intimate.

It's simple – all respondents need to do is answer the phone.

It's familiar – everyone understands how to answer a phone and have a conversation.

It's intimate – respondents are comfortable sharing their thoughts and opinions with one person who demonstrates empathy throughout the discussion.

Deliver meaningful insights

After 10 years of conducting phone IDIs, I'm convinced that this simple methodology offers superior value for the client, the best experience for the respondent and the greatest opportunity for the researcher to deliver meaningful insights.

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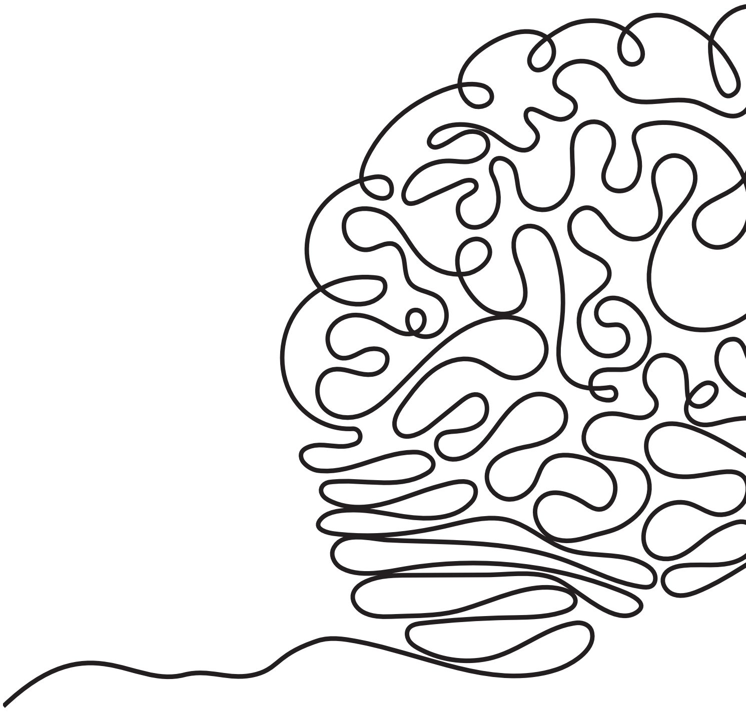
••• customer satisfaction research

Hardwired for satisfaction

Use neuroscience to fine-tune your customer expectations strategy

| By Terry Grapentine



abstract

Marketers want to exceed customers' expectations to promote brand loyalty. The brain's reward system enables this strategy to work. Terry Grapentine explains how expectations are related to customer satisfaction and its neurobiological basis.

The customer expectations concept has been in the marketing lexicon for many decades. In 1982, Gilbert Churchill, Jr., and Carol Surprenant formalized the definition of this concept[1] as it relates to predicting customer satisfaction. They conceptualized "expectations" as a forecast of perceived product performance to discover if a product exceeds, meets or underperforms the customer's expectation.

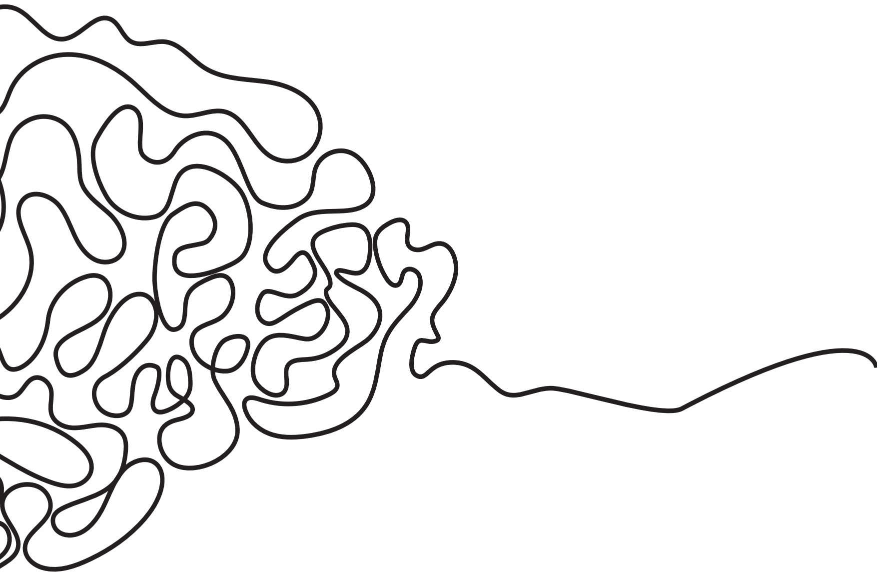
This article encloses the term "expectations" in quotes when referring to it as a concept. When this term describes a customer's belief, no quotes appear, e.g., the customer's expectation was that a cookie would have between five and seven chocolate chips, no more, no less.

In the 1990s, the field of neuroscience began to investigate the biological basis for the "expectations" concept. Neuroscience has shown how the brain continuously 1) forecasts our internal, homeostatic body-state (e.g., body temperature, blood pressure) and 2) alters our physiological and behavioral responses to external, allostatic stimuli (e.g., threats, opportunities). The brain does this to detect unexpected changes affecting our survival and well-being. Translating this to consumer purchasing behavior, customer "expectations" relates to the unexpected difference between forecasted product performance and post-purchase perceived product performance. Did the product perform as expected?

There is, therefore, a proven neurological basis for the "expectations" concept in marketing. This article relates how neuroscientists demonstrated this relationship and how marketers can leverage it to their advantage.

Figure 1 shows how Churchill and Surprenant incorporated several expectations concepts as predictors of customer satisfaction. Here's an interpretation, based on an example of purchasing a kitchen refrigerator:

Pre-purchase expectation (E): Forecasted product performance, e.g., "When I go shopping for a new fridge, I forecast that all refrigerator manufacturers offer only a 10-year warranty."



Post-purchase perceived performance (P): Actual product performance, e.g., “Great! I got a 15-year warranty on my fridge vs. the 10 years I thought I would get.”

Disconfirmed expectation (DE): Is given by the formula, (P – E).

In our example, (P – E) = (15 years – 10 years) = +5 years.

In this example, receiving five more years of warranty results in an increase in satisfaction; satisfaction was disconfirmed positively. Disconfirmed means that $P \neq E$.

However, in some situations, $P - E < 0$ represents an increase in satisfaction. For instance, one expects to wait in a bank-teller line for five minutes but only waits two minutes. Now (P – E) = (two minutes – five minutes) = -three minutes. Customers prefer shorter to longer lines, therefore, a negative (P – E) denotes an increase in satisfaction.

The arrows denote the functional relationships among the concepts. In applied research, tools such as structural equation modeling estimate coefficients reflecting how much one concept influences another, either directly or indirectly.

Satisfaction (S): Satisfaction either increases, decreases or does not change for a given attribute based on the model’s coefficients. The authors used a multi-item scale to measure the satisfaction concept. For example, one measure they used was a seven-point scale ranging from “I like this [product]” to “I dislike this [product].”[2]

Neurological foundation of customer expectations

So, what happens in your brain when expectations do not match reality? A lot.

Our story begins with Wolfram Schultz et al., who recorded responses from neurons in the midbrains of monkeys.[3] This area of the brain is known as the brain’s reward system[4] or the reward pathway.[5]

Figure 1: Churchill and Surprenant’s Disconfirmed Expectations Model of Customer Satisfaction

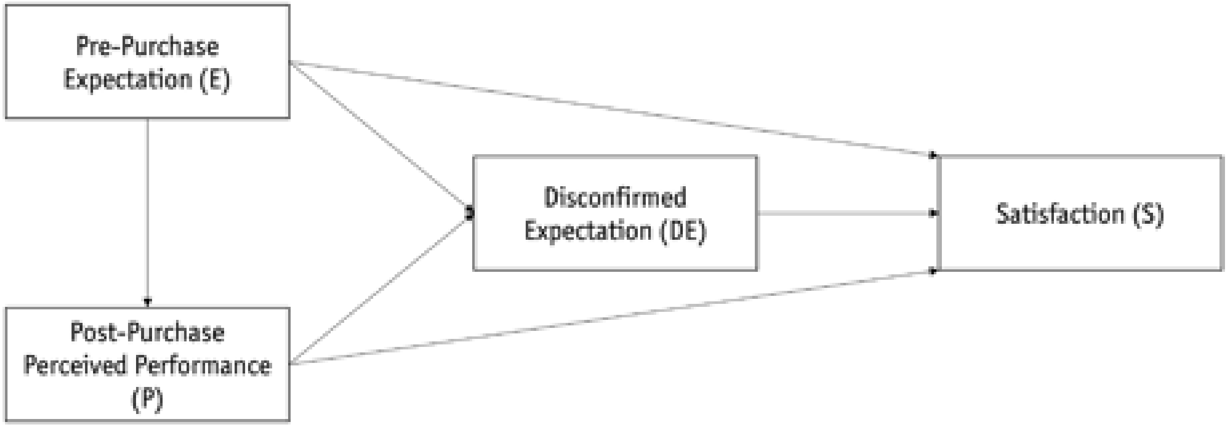
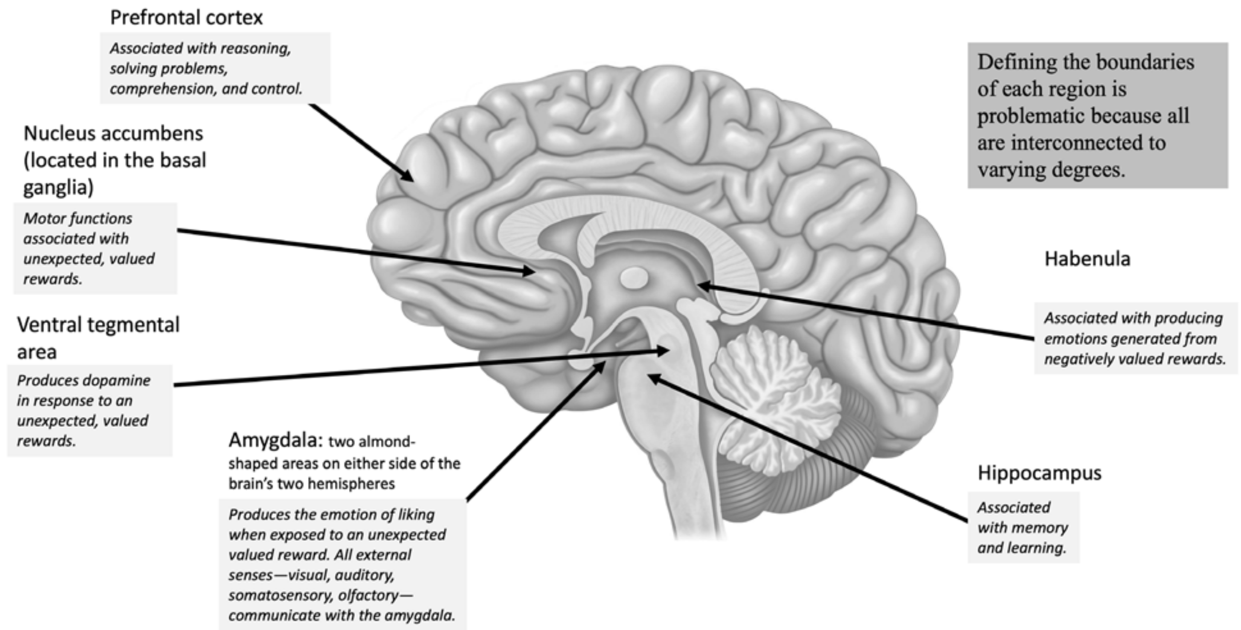


Figure 2: Human Brain Reward System Regions



Schultz's research called for placing small electrodes in the ventral tegmental area (VTA) of a monkey's brain, which is comparable to its location in the human brain. When a monkey (or human) is at rest, the VTA's neurons fire at a frequency called its base rate of firing. "Schultz noticed that the neuron's base rate of firing shot up (that is, spiked) if the monkey unexpectedly received a valued reward (a squirt of juice)."[6] Another term for "spiked" is prediction error: "the discrepancy between the expected outcome (the VTA's base rate) of an action and the outcome that actually occurred [the VTA's spike]."[7]

Similar studies on humans using different tools, e.g., alternative brain scanning methods, show that the brain's reward system in monkeys and humans is similar. In fact, "the [brain's] cortex has essentially the same architecture in all mammals, whether bats or baboons or us."[8]

Unexpected, valued rewards cause a prediction error in the VTA's base rate.[9] When excited in this way, the VTA releases the neurotransmitter dopamine, which communicates information to other parts of the brain, nearly simultaneously.[10] The more exciting the subject finds the stimulus, which is learned over life's experiences, the more dopamine the VTA produces.

Amygdala: influences emotion creation ("I really like that 15-year warranty on the fridge!").

Nucleus accumbens: controls the body's motor functions ("I'm going to walk over to that fridge and look at it more closely.").

Prefrontal cortex: relates to planning, decision-making ("All things considered, I am going to buy that fridge.").

Hippocampus: memory formation ("I need to remember this brand next time I want to buy an appliance.").

When a stimulus activates the brain's reward system – and this activation occurs subconsciously[11] – your brain tells you something unexpectedly good happened, it delivers positive reinforcement, "This is good, let's do it again!"[12] This is what produces the various emotional levels of pleasure you feel. And your brain does this whenever, out of the blue, you receive a compliment, win at a game, eat delicious food or get something you value from a product you did not expect.[13] (The process is more complicated than explained here. See footnotes for additional sources and more elaborate discussions of the reward system.)

As Churchland says, "What these neurons in the VTA care about is the difference between what was expected at a certain time and what actually occurred at that time…".[14] This is what Churchill and Surprenant call "disconfirmed expectations." An analogous sequence of events occurs whenever, unexpectedly, you experience an event you dislike, causing different parts of the brain to produce different neurotransmitters (e.g., the habenula releases serotonin).

Leverage this knowledge

Science has validated the existence and meaning of customer "expectations." Consequently, the concept has a solid foundation in marketing and neurobiology. So, how do marketers leverage this knowledge?

Conduct research with customers and brainstorm with marketing executives to come up with a customer-expectations strategy. There are numerous sources of information you can search on the internet. For instance, a Google query of "how companies exceed customer expectations" identified over 380 million citations!

Keep in mind that you must define what "expectations" means in the context of your products and target market segments. It is not a simple one-size-fits-all definition. Consumers' expectations must be studied via primary research. For example, in a study commissioned by a worldwide cruise line company, the research department added the following questions to their customer-experience tracking study:

On your last cruise with …, did anything happen that surprised you in a positive way?
☐ Yes (*ASK OPEN-ENDED QUESTION*)
☐ No
Please explain:

On your last cruise with…, did anything surprise you in a negative way?
☐ Yes (*ASK OPEN-ENDED QUESTION*)
☐ No
Please explain:

Research findings delivered insights into the nature of these surprises that most influenced brand loyalty and helped management brainstorm future strategies and tactics.

Finally, a product cannot exceed a customer's expectations endlessly – the brain imposes guardrails on its reward system.[15] Schultz's experiments show that successive squirts of juice in the monkey's mouth sequentially reduce the spikes in VTA-neuron activity, dopamine production and the feeling of pleasure. This is also true for consumers. For a company to advertise, "We exceed our customers' expectations," implying they do this all the time, is a fool's errand. Therefore, introduce variety over time in your customer-expectation strategies and tactics. After all, variety is the spice of life and a key to attracting and keeping customers.

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9 Different authors describe the reward pathway differently. This interpretation is based on material from the Kahn Academy (2023) and Churchland, P.S., (2019), pp. 75-85.

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12 Kahn Academy, (2023), time stamp, 3:04.

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••• brand research

Meet them where they are – and will be

Framework aims to help brands connect with consumers' evolving needs

| By Jeremy Cochran

abstract

Consumers' expectations for individualized experiences have taken control of brand marketing, making it essential for brands to be relevant and compete with momentum. Brands can navigate these challenges by focusing on maintaining a consistent presence, differentiation, affinity, vibrancy and advocacy.

Brands aren't just brands.

To be successful, brands today must represent much more than their products or services. They have to be heroes, best friends, counselors, teachers and representatives. And in today's hypercompetitive environment – defined by a constantly shifting global market and ubiquitous social media – consumers can abandon their long-established brand relationships at a moment's notice. More than ever before, consumers' expectations for individualized experiences set the tone, pace and direction for a brand's voice and character. In a way, you might say consumers have taken control of brand marketing.

In this challenging landscape, what does a strong brand look like? And how do you measure it?

Traditional brand health models focus on awareness and performance, looking at how popular a brand is and how it performs in key areas. More recent models consider the unique challenges of the modern market, gauging a brand's ability to make emotional and social connections with consumers. Specifically, Burke's own brand health framework evolved to focus on how brands can deepen relationships with target consumers and foster more meaningful connections.

However, a substantial gap still exists between what brand-tracking research delivers and what brand managers actually need to create effective marketing plans. Brand-tracking programs work well for showing how the brand has done; marketers, however, need to know the best strategy for future growth.

In other words, marketers don't just need to know where brands have been, they need to know where the brand is going.

We have seen evidence of this gap firsthand. As consultants, we have observed changes in the questions our clients and their stakeholders ask us: How will the market change? What should we do about it? Who will

take our share? How will our customers' expectations change and how can we meet their needs? What should we do differently?

Questions like these speak to concerns about the future, defined by the uncertainties of a shifting present. And to provide answers, researchers need models and insights systems that help brand leaders address the challenges of the present also while looking beyond the here and now.

Incorporate research and strategy

Any new framework that aims to help brands navigate today's challenging environment must incorporate both traditional market research and brand strategy perspectives. While researchers have the expertise to develop new metrics and uncover connections, strategists understand how brand managers and marketing teams think, process information and make decisions. A purely research-focused framework could lack relevance to the realities of marketing decision-making, while a purely strategy-focused framework may miss out on connections that can be found through analysis.

Our goal was to develop validated, relevant metrics that research teams could use to provide predictive insights to brand managers – namely, what would define success in the future, given the changing competitive landscape. To achieve this, we crafted a "north star" philosophy that centered on two critical pillars of brand strength:

First, brands need to be relevant. That means maintaining a consistent presence in consumers' minds, understanding and meeting consumer needs and differentiating from other, similar brands.

Second, brands must compete with momentum. That means brands must show consistent forward movement, while demonstrating vitality and growth potential.

Together, relevance and momentum define a brand's overall strength. In addition, mapping a brand's market position – as well as that of competitors – provides context, based on relevance and momentum, which can be instrumental in helping set strategy for future success.

Relevance: still the heart of the matter

At its core, a strong brand is one that has formed connections with potential users. While there is debate about how close and enduring those connections need to be, strong brands are the ones that consumers can easily recognize, have at least some kinship with and see as different from others. In short, strong brands stand out because they stay relevant.

This element of brand strength is nothing new. Brands spend millions on increasing awareness, crafting an identity consumers can connect with and distinguishing themselves from competitors. Broadening and strengthening relationships with consumers remains a core element of brand growth, even in the modern environment.

Relevance is comprised of three dimensions:

Presence. Simply put, brands cannot grow if they're not known among potential users. Presence stems primarily from elements captured in traditional funnel metrics (i.e., awareness, consideration and purchase). These measures still represent the primary means by which consumers interact with brands. Top brands like Facebook, Wal-Mart and Coca-Cola have a strong presence among consumers they can leverage to strengthen their identity.

Distinction. Distinctive brands drive a sense of differentiation and demand a higher price point. Brands that stand out from the crowd (in a good way) will have an easier time growing. For example, distinctive brands like Apple and Mercedes-Benz elicit a different type of attention than brands that are seen as more interchangeable.

Affinity. Relevance is not just about being known and recognized. It's about fostering a strong sense of connection – or affinity – with consumers. In other words, the more consumers feel they identify with (and can rely upon) a brand, the more likely that brand is to endure and flourish. While users don't need to profess blind loyalty to a brand, closer relationships between consumers and brands signify a stronger, more enduring position in the market. Visa, Marriott and Oral-B are examples of brands that demonstrate high affinity – they convey a sense of trust and empathy that helps consumers feel understood.

Momentum: Fuel for growth

Most traditional brand health models stop at relevance, with the underlying assumption that strengthening existing relationships with consumers will lead to growth. This would be fine in a world where success was solely defined by a brand's image and product quality. But, as mentioned before, expectations for brands have multiplied. Consumers now expect brands to evolve, push boundaries and influence society beyond just their products. Brands that are not moving forward (or try to resist change) are soon seen as stale, out of touch and may be outshone by newer or more dynamic competitors. In short, strong brands stay strong because they compete with momentum.

Momentum is comprised of two key dimensions:

Vibrancy. Vibrant brands demonstrate ingenuity and agility. They never rest on their laurels. They're always innovating new products, new features or new ways of connecting with their users. Consumers can quickly turn on brands that give even a hint of entitlement, especially in a time of rising prices and increasing pressures on buying power. By contrast, brands that demonstrate their commitment to continuous renovation, reimagining and reconnecting will propel themselves forward. Vibrant brands like T-Mobile, Venmo and TikTok give consumers the sense that there's always something new around the corner.

Advocacy. Along with a focus on the future, brands also must look beyond their business into the world around them. Consumers expect brands to act as corporate citizens and advocate for causes that align with their values. While many brands would likely prefer to steer clear of controversial issues, consumers recognize the financial and cultural power that large brands – and their parent companies – hold; thus, they often demand recognition and action when it comes to certain issues. Additionally, brands can lean into their advocacy, incorporating their passion for causes as part of their brand messaging.

Brands that have a clear environmental purpose (such as Tesla, with electric vehicles) or that have aligned with social movements (such as Nike's provocative advertisements with Colin Kaepernick) demonstrate their leadership in the modern brand environment. While taking an active stance on issues can be risky, brands that ignore or detach themselves from issues risk alienating consumers and losing momentum.

Metrics that connect

Our relevance and momentum framework was developed based on months of research and development. After conducting a literature review, referencing established brand models and brainstorming a range of potential approaches with our experts, we reduced these down to an initial framework. We vetted and validated this framework via primary research, then formulated associations between key brand measures and business-outcome metrics, which included financials and social media presence.

Our final framework shows a strong, significant relationship between brand strength and financial strength, as well as social media strength. In addition, we found that relevance and momentum connect to inform different elements of brand success: higher relevance connects to current success (such as revenue, EBITDA and followers), while brands with higher momentum are more likely to have shown recent growth.

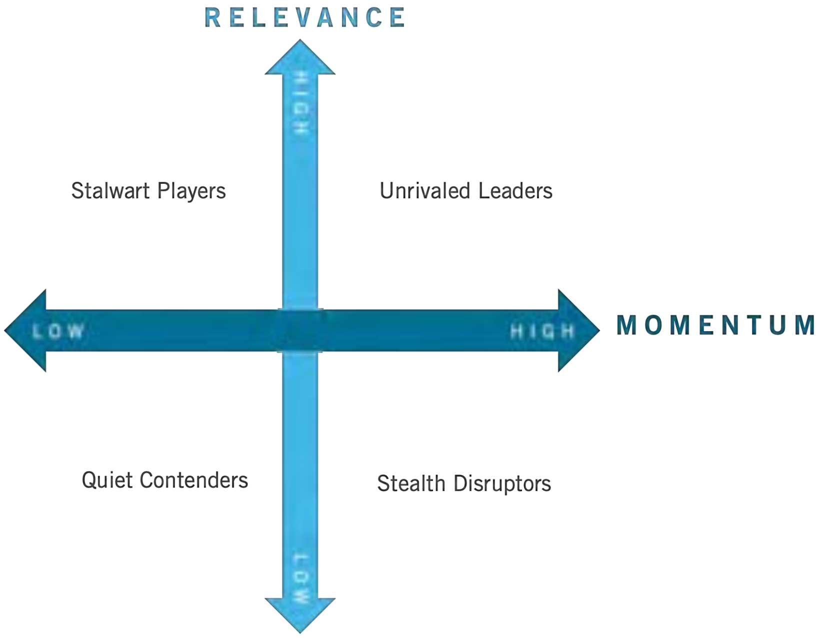
Four archetypes

Viewing brand strength as the intersection of relevance and momentum also enables mapping the market landscape for a product category along two axes, where X represents relevance and Y represents momentum. The resulting quadrants represent four market archetypes (Figure 1) that describe a brand's position in their given market:

Unrivaled Leaders. Brands with high relevance and momentum have a strong influence on the marketplace that will likely endure. Brands in this quadrant can focus on maintaining their position while keeping the momentum that sets them apart from the competition. Apple is a clear example of an Unrivaled Leader in the personal technology category.

Stalwart Players. Brands with high relevance but lower momentum are well-known players in the market

Figure 1



but may be seen as less engaged or energetic than certain competitors. Brands in this quadrant may have relative security and should focus on maintaining their brand identity. Yet, they risk losing interest from consumers without new energy. In our research, Facebook is a strong example of a Stalwart Player, given its strong market position but less vibrant reputation.

Stealth Disrupters. Brands with lower relevance but higher momentum project an entrepreneurial vibe that resonates with consumers but has yet to widen (or deepen) their relationships with consumers. Brands in this area should identify how they can utilize the buzz around them to broaden their market base and create a stronger reason to buy. With its reputation for innovation and growth while not yet a mainstream presence in the market, Tesla is an example of a Stealth Disrupter in the auto industry.

Quiet Contenders. Brands with lower relevance and momentum are recognized by consumers but have less of an influence on the market. While brands aren't likely to be comfortable here overall, there are benefits to being a smaller player: brands in this quadrant generally don't have a strong identity in the market (yet), so they have the chance to craft a new story. An example from our research is Dollar General – while a top name in the discount retail space, Dollar General is a Quiet Contender when compared to other large retailers such as Target, Amazon and Walmart.

While most brands would prefer to be an Unrivaled Leader in every category, the implication of being in any quadrant comes down to whether a brand's placement aligns with its strategy for the category. A brand could be an Unrivaled Leader in its primary category but a Quiet Contender in an ancillary category, based on its marketing strategy.

Close the gap

At the end of the day, this evolution of brand performance monitoring can help close the gap between what marketers need (a way to measure what matters to them today) and what researchers can provide (a strong metric that helps give strategic direction). Developed by both researchers and strategists, this relevance and momentum framework provides a simple yet effective option for assessing a brand's position in the market and activating solutions to improve that position.

Jeremy Cochran is R&D manager at Burke, Inc. He can be reached at jeremy.cochran@burke.com.

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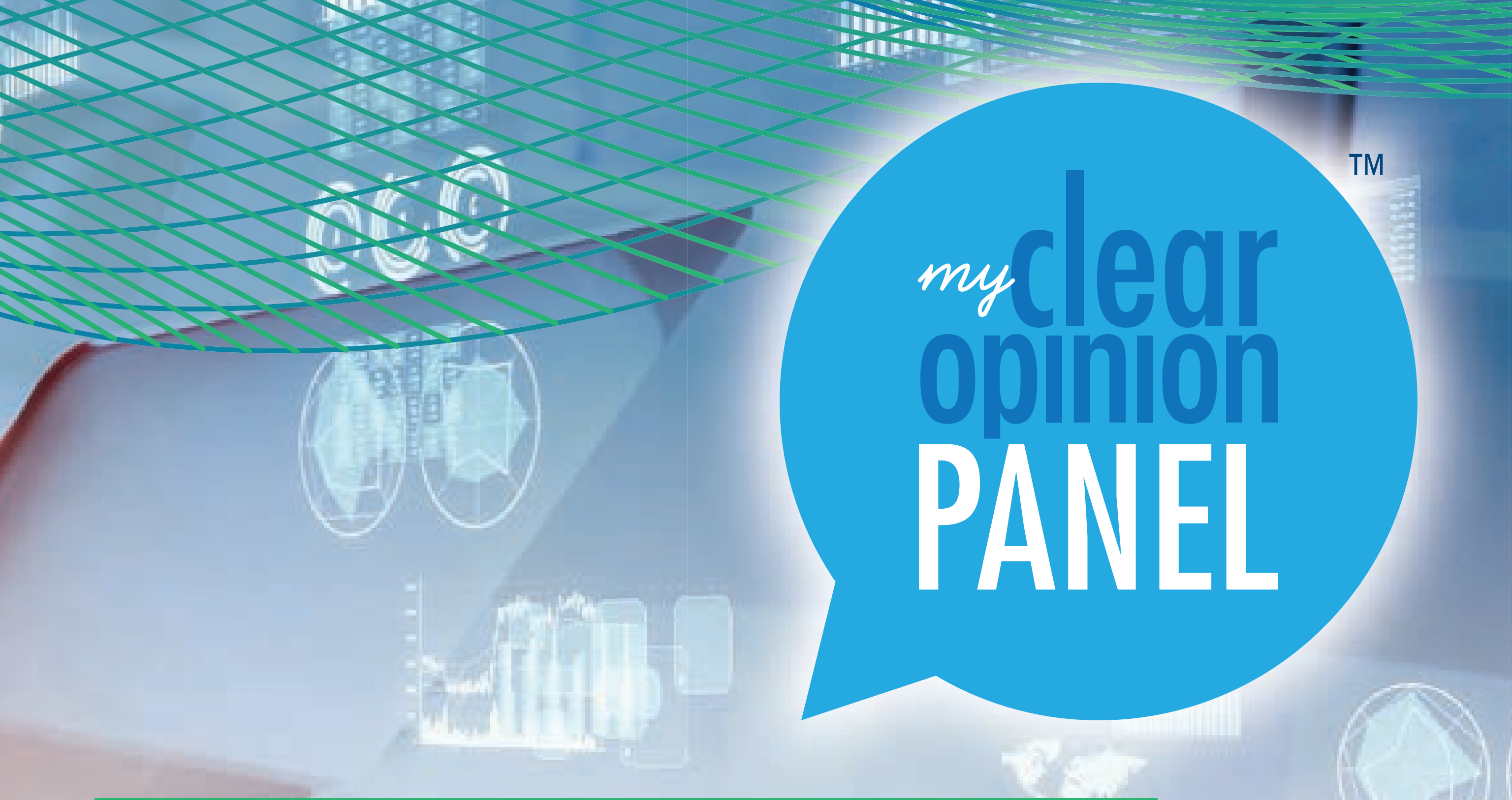

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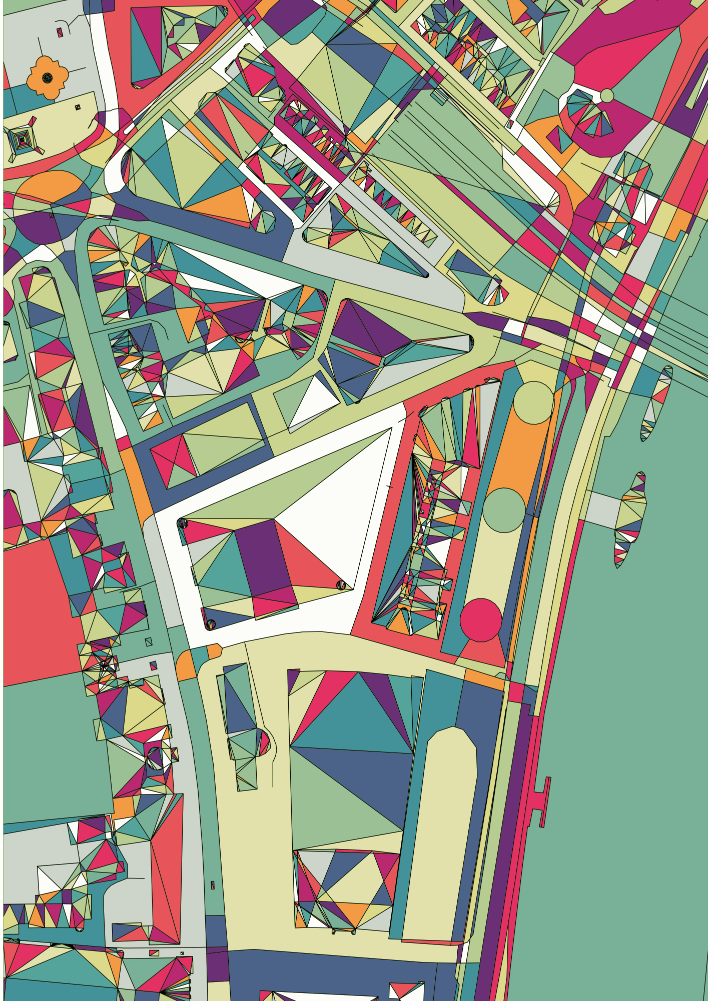


Uncovering hidden insights

How generative AI is transforming open-end analysis

| By Rick Kieser

abstract

Discover how AI can reshape marketing research by accelerating analysis of open-ended comments for actionable insights. From assessing customer satisfaction in health clubs to unveiling sentiment trends in social media, generative AI can deliver comprehensive summaries, driving understanding while maintaining the vital role of human oversight and interpretation.

Artificial intelligence (AI) has gone mainstream and there is simply no escaping reading, hearing and talking about it. No matter the industry, AI will impact it. Indeed, AI is already impacting such disparate industries as finance, health care, travel, national security and farming!

Marketing research has traditionally been hesitant and slow to adopt change as an industry. However, in the case of AI, we've already rapidly embraced many AI-based tools. To increase the value of these tools, researchers will benefit from understanding them and what they can do to help now and in the future to satisfy the ever-increasing demand for lower costs, greater efficiency and faster and better insights.

Why marketing research needs AI

Marketing research is the foundation of successful marketing, product development and customer service. But traditional research can be expensive and time-consuming. Simple surveys can cost between $15,000 and $45,000 and often much more, and B2B one-on-one interviews cost $300 to $500 each and more. Focus groups, on average, cost $8,000 each. And a simple project takes weeks to complete.

Further, traditional research is not designed to handle the mass of data now available in some businesses (e.g., retail, CPG and others). As a result, due to the cost and time investment needed, many companies are priced-out of using research completely. And many companies opt to use market research only for the most critical and risky projects, such as product launches.

As an industry, we must find ways to reduce the cost and time barriers to marketing research and make insights more available for businesses inundated with omnipresent feedback. AI is an essential piece of that solution.

AI 101: Moving to advanced generative AI

AI is a wide range of technologies that apply to many different situations and refers to the ability of machines to perform tasks that typically require human intelligence, such as learning, problem-solving and decision-making. Generative AI is a specific type of AI that uses algorithms to generate new content, such as text, images and audio, based on the data on which it has been trained. The main difference between AI and generative AI is that AI is a broad term encompassing many different algorithms. In contrast, generative AI is a specific type of AI that focuses on generating new content.

The earliest implementations of AI used a rules-based approach limited by a lack of context, a limited vocabulary and overreliance on patterns. Natural language processing (NLP) enabled machines to understand and work with human language. Other language models, such as BERT, provided pretrained models that can be fine-tuned for specific NLP tasks. With the introduction of machine learning algorithms such as generative adversarial networks (GANs), AI has become more powerful and capable of creating convincingly authentic content. More recently, rapid advances in generative AI and in large language models (LLMs) have provided the ability to produce even more creative results. As a result, generative AI has become a game-changer in many fields, including art, biology, programming, writing, translation and more.

While there is currently some experimentation with using AI to develop surveys and analyze survey datasets for comprehensive insights, most AI usage in the insights industry has historically been in the analysis of open-end comments. Generative AI already positively impacts the industry, especially in analyzing open-ends from surveys, social media, reviews and other sources. It has been used in the industry for nearly a decade. It is always important to remember that AI's value is to increase the speed of delivery and reduce expense, not to eliminate critical human oversight, validation and interpretation.

Where are we at currently?

In November 2022, generative AI was launched globally. Because the developers understand that researchers must always use results to deliver meaningful insights, the companies developing these tools are trying to understand how researchers want to use generative AI and what they want the tools to accomplish. As a result, there has been a flurry of applications using generative AI within the open-end analysis space and the tools are evolving rapidly to be not only easy to use but also effective in providing better analytics and insights.

One important evolution was to advance the results produced from topics (simple, one-word facts) to themes (more descriptive ideas with more human-like insights). Because important insights are often found in open-end responses, analysis that results in themes allows the researcher to find those insights faster without all the manipulation necessary with topics. For example, a topic-based analysis for a clothing manufacturer might give the result “zipper,” and you would have to look deeper to find the issue. Themes, however, would return “the zipper is broken.” Similarly, for a restaurant, a topic results might be “food,” where themes would give you "the food is delicious" or “the food is cold,” telling you immediately what action you need to take. Themes are all-encompassing, while topics are narrow, and themes, as logical ideas, give you direction for subsequent actions.

Generative AI has also powered the development of several other advances:

- The ability to easily net themes for increased insight gave even more power to generative AI open-end analysis by quickly facilitating human interpretation and combining similar themes.
- Adding sentiment analysis to themes also helps researchers quickly sort and communicate the brand or product’s status and track how it changes over time, significantly reducing analysis time.
- Segmentation analysis allowed researchers to understand better how perceptions differ by segments within the data.
- And finally, multilingual capability eliminated the need to translate responses before analysis.

These advances came from developers understanding what researchers needed and responding by building new and better capabilities with generative AI into their market research solutions.

Case studies

The latest evolution of generative AI is moving beyond delivering topics or themes to providing more comprehensive and illustrative summaries from the analysis. To shed light on this capability, here is a case study based on a one-question customer satisfaction survey about a health club. A total of 2,000 responses were analyzed.

- The first analytic query was, “Are customers generally satisfied with their experience at the clubs?” The generative AI tool responded: "*No, customers are not generally satisfied with their experience at the clubs. While some customers have had positive experiences with the local employees, many customers have expressed dissatisfaction with the condition of the facilities, the lack of updates and the lack of amenities.*"
- The second query was,“What are some actions the owners can take to improve customer satisfaction?” which got this response: "*1. Ensure that maintenance issues are addressed promptly, even on weekends. 2. Improve the cleanliness of the facility, especially in areas such as the women's bathroom, shower area, pool, jacuzzi and steam room. 3. Set all clocks correctly. 4. Install more fans to improve air movement in the facility. 5. Allow members to extend their trainer sessions at the rate they signed up for. 6. Reallocate funds from transforming and furnishing offices to improving the club.*"
- The next query was, “What are some things the fitness clubs are doing well?” Positives for the clubs are: "*The fitness club is doing well in having a highly trained and professional personal training staff. They have also done a good job of making the gym look fresher and more inviting by adding plants. They have also been friendly to guests and offered free 10-day memberships to family and friends.*"
- The next query was limited to the segment of NPS detractors. The query asked what NPS detractors say about the clubs and generated this response: "*NPS detractors are saying that the bathrooms are not clean, the personal training area is too small and uncomfortable, there is not enough variety in the extra workout classes, the markings on the plates on most machines are rubbed off, it is very hot and humid in the locker room and the ceiling fans in the basement are growing hair on them.*"
- Finally, a query about a specific area of the club, the pools, resulted in this response: "*The biggest complaints about the pools are that the water is cloudy and too cold, the whirlpool is broken or not hot, the sauna is not very hot and the walls and floors of the pool area are peeling paint and have chipped and broken tiles. Additionally, there is no temperature regulator on the pool shower and no paper towels in the locker room.*”

This type of analysis also applies very importantly to non-survey open-end comments. Here is an example analysis of 1,500 social media posts from visitors to the London Eye:

- The first query was, “What is this dataset about?” The response was: "*This is about customer reviews of the London Eye experience. It includes information about the customers' experiences and recommendations and responses from the Customer Services Team.*"
- The second query was, “What are customers happy with?” The response was: "*Customers are happy about the knowledgeable and humorous guides, the champagne experience, the great views and the ability to create good memories and take good photos.*"
- “What are the top three improvements the London Eye could make to improve people’s experience?” was the third question. AI generated the following suggestions: "*1. Provide an audio commentary to give visitors more information about the landmarks they are seeing. 2. Make the wheel stop periodically to allow less-mobile or disabled visitors to board. 3. Provide a map or guide to help*

Figure 1

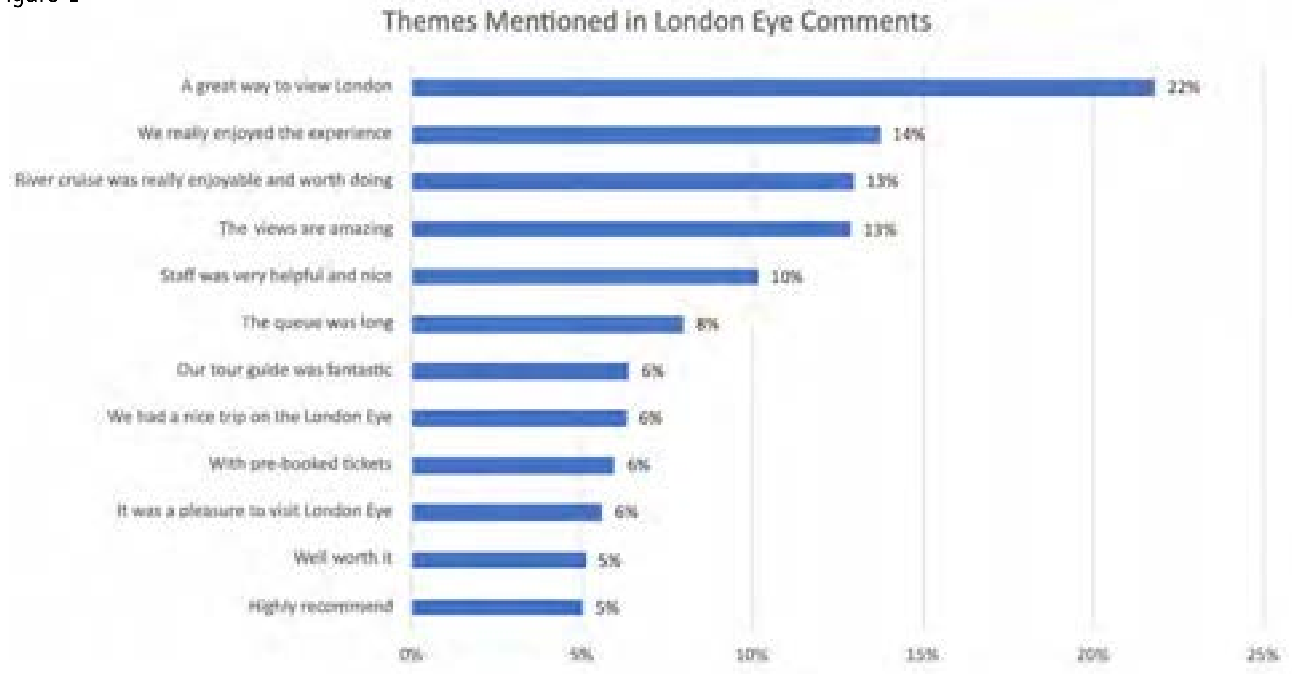
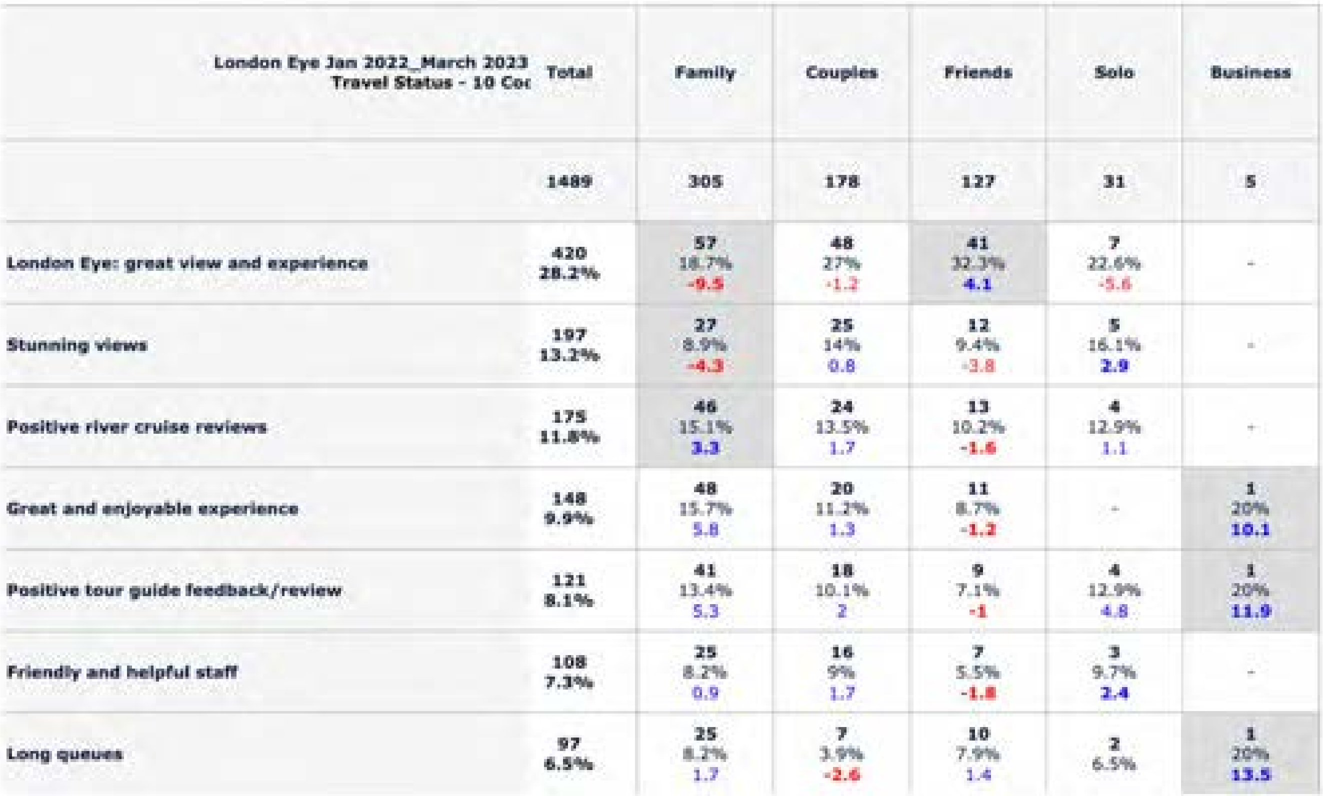


Table 1



London Eye Jan 2022_March 2023 Travel Status - 10 Coc	Total	Family	Couples	Friends	Solo	Business
	1489	305	178	127	31	5
London Eye: great view and experience	420 28.2%	57 18.7% -9.5	48 27% -1.2	41 32.3% 4.1	7 22.6% -5.6	-
Stunning views	197 13.2%	27 8.9% -4.3	25 14% 0.8	12 9.4% -3.8	5 16.1% 2.9	-
Positive river cruise reviews	175 11.8%	46 15.1% 3.3	24 13.5% 1.7	13 10.2% -1.6	4 12.9% 1.1	-
Great and enjoyable experience	148 9.9%	48 15.7% 5.8	20 11.2% 1.3	11 8.7% -1.2	-	1 20% 10.1
Positive tour guide feedback/review	121 8.1%	41 13.4% 5.3	18 10.1% 2	9 7.1% -1	4 12.9% 4.8	1 20% 11.9
Friendly and helpful staff	108 7.3%	25 8.2% 0.9	16 9% 1.7	7 5.5% -1.8	3 9.7% 2.4	-
Long queues	97 6.5%	25 8.2% 1.7	7 3.9% -2.6	10 7.9% 1.4	2 6.5%	1 20% 13.5

visitors identify the landmarks they are seeing."

- The next query was, "Looking only at reviews from families who visited the London Eye, what are their key likes and dislikes?" The results were: *"Likes: Beautiful views, Spectacular views of London, Our tour guide was wonderful with descriptions and jokes. Dislikes: Overcrowded cabins, Lack of rules for how many people can get in the cabins."*
- Another query, asked only of a segment of all social media reviews, was "What are people happy about in reviews posted since April 2022?" This list of the most frequent topics was AI-generated:
  - *Iconic, amazing 360° views of London*
  - *Knowledgeable, approachable, fun tour guides*
  - *Comfortable way to see the city*
  - *Great historical facts and pointers for our trip*
  - *2-for-1 tickets*
  - *Running commentary was really entertaining and informative*
  - *Fun and educational trip*

Generative AI is very good at summarizing text information but it is not good at quantification. And as researchers, we typically need to quantify the analysis results. When you need to build a code book, using themes is a good start, but to refine and develop the codes to be applied, you need human oversight, validation and interpretation. Applying AI themes analysis to the London Eye open-end comments successfully identified 138 codes (covering 96% of the total comments). After the themes were analyzed and aggregated by the researcher, the results were quantified as shown in Figure 1.

Further, once the comments are coded and quantified, they can be further analyzed to explore different segments of respondents and to generate additional insights, as in Table 1.

Summaries, which generative AI helps develop, are an essential advancement in open-end analysis solutions because they give researchers enough detail to quickly understand the verbatim responses while saving time in wrangling the data into meaningful and valuable information. However, to turn verbatim comments into quantitative information, you need a human being to massage the results of the generative AI analysis and communicate it to the end client. It is important to remember that the key benefit of generative AI is not to eliminate human review and interpretation but to put human time and talent where it is most valuable: in validating, evaluating and communicating essential insights to clients. Generative AI will continue to evolve and improve but human oversight will always be needed. In any event, generative AI unleashes the power of summaries to quickly comprehend what open-end comments are telling you.

Evolve and change

As our industry continues to adopt and embrace generative AI, the research solutions will evolve and change to meet our needs better. At this point, they deliver sound value to the market research organizations using them, saving time and labor and helping researchers put their effort where they are most valuable. If you haven't tried solutions that analyze open-ends, or if you tried them and rejected them previously, now is a great time to take a look at these platforms. Generative AI for open-end analysis is here to stay. If you need to analyze open-ended comments, you can't afford not to jump on board.

Rick Kieser is CEO of Ascribe. He can be reached at rick.kieser@goascribe.com.

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20 TOP DATA COLLECTION COMPANIES

Data collection companies can offer a variety of different but effective ways to gather the information you need for your research project. It is crucial to have a secure way of collecting reliable data to make informed and effective decisions.

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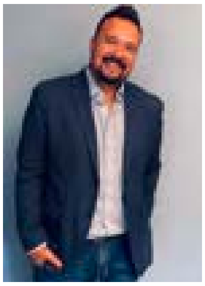

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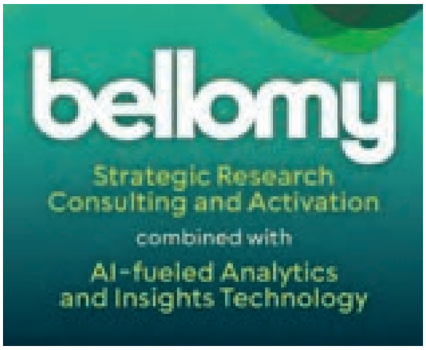

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THE Q REPORT

CORPORATE **RESEARCHER** REPORT 2023

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

QUIRK'S MEDIA

WELCOME TO THE TENTH ANNUAL Q REPORT!

The Q Report work life and salary and compensation study of end-client/corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research subscribers of Quirk's.

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

The survey was fielded from May 24 to July 10, 2023. In total we received 1,969 usable qualified responses, of which 707 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.17 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

The purpose of the Q Report is to give corporate researchers an in-depth look into their world, helping them learn more about what their peers and colleagues are doing and also benchmark themselves and their departments.

In this edition, we will focus on the changes respondents said they foresee their organizations making related to marketing research in the coming year; the areas in which they would most like to improve communication with internal departments and stakeholders; their thoughts on why stakeholders have not included the insights function in important business decisions; and their assessment of the available marketing research tools and methods. Elsewhere in this issue we look at some job- and employment-related topics around work satisfaction, hiring plans and the importance of workplace flexibility.

In the coming months we will draw from Q Report survey findings to explore topics such as readers' thoughts on generative AI, their organizations' abilities to understand their customers, their use of outsourcing and how their insights departments are structured. So be on the lookout!

We hope you find this information useful. Please let us know how we can make future Q Reports more informative and valuable to you!

Sincerely,

Joseph Rydholm
Editor
joe@quirks.com

THANKS TO OUR CONTENT PARTNERS FOR SHARING THEIR INDUSTRY INSIGHTS:

SyncScript explores what AI *doesn't* do for research.

Glass shows why agile research isn't a replacement for know-how.

Glimpse covers lessons learned from generative AI.

Echo Market Research focuses on finding the right research participants.

Tremendous looks at respondent incentives.

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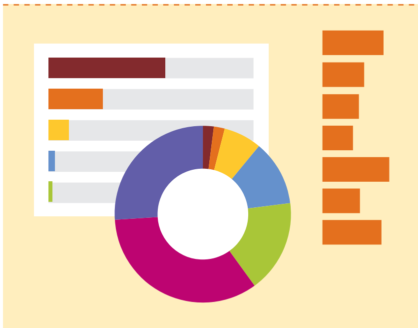

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QUIRK'S MEDIA

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FIGHTING THE GOOD FIGHT

Better communication seen as key to defining, enhancing researchers' role and internal standing

By Joseph Rydholm >> Quirk's Media

For this, our tenth annual Q Report, we are shaking things up a bit! Instead of presenting all the data in one issue, we're going to spread our coverage out across the magazine and our digital outlets over the next several months, starting with a regular Q Report feature in each bimonthly issue of the magazine and some occasional Quirk's e-newsletter articles as well. In the next issue of the magazine, for example, we will look at the responses to our question from this year's survey about respondents' plans for using generative AI. Early-2024 issues will cover topics like outsourcing and vendor communication.

The Q Report work life and salary and compensation study of end-client/corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research subscribers of Quirk's. The survey was fielded from May 24 to July 10, 2023. In total we received 1,969 usable qualified responses, of which 707 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.17 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

For my annual overview piece, we will focus on the following: the changes respondents said they foresee their organizations making related to marketing research in the coming year; the areas in which they would most like to improve communication with internal departments and stakeholders; their thoughts on why stakeholders have not included the insights function in important business decisions; and their assessment of the available marketing research tools and methods. Elsewhere in this issue our team will look at some job- and employment-related topics around work satisfaction, hiring plans and the importance of workplace flexibility.

We've always viewed the Q Report as more of snapshot in time than an assessment of the state of the industry. Our goal has been to give readers a way to benchmark their situations and experiences with those of their peers and also provide a forum for them to express in their own words the highs and lows of working in marketing research. If there are topics you'd like us to cover or questions you'd like us to ask in future Q Report surveys, please let me know at joe@quirks.com.

What's ahead in the coming year?

Two alphabetisms were common response choices to the question about the biggest marketing research-related change readers foresaw their organizations making in the coming year: AI and DIY. The AI responses typically were quite short – often just "AI" – with most centering around incorporating AI in some unspecified manner – a vagueness that's understandable given AI's newness and the lack of clarity surrounding its potential use and impacts.

On the DIY front, researchers' definition of DIY seems to have morphed from one that used to refer to rogue internal clients sending out surveys on their own without consulting the insights team to a definition that basically means "we're keeping things in-house."

> "'Keeping things in-house' is an understatement. As an increasingly data-driven organization, in-house even means playing a supervisory role with external research partners to ensure that we're integrated and building on previous work, wherever it was performed. Getting ultra-specific to our business context means it's harder for vendors to get away with off-the-shelf approaches. We want something uniquely for us and we're going to be hands-on about it."
>
> **BESSAM MUSTAFA**
> DIRECTOR, FAN INSIGHTS
> TORONTO BLUE JAYS BASEBALL CLUB

> *Budgets were slashed this year, meaning very little ad-hoc, strategic work will happen unless internal clients have funding. We are mainly focused on core research surrounding product development and communications and brand health. We continue to do 90%+ of the work DIY.*
>
> *Doing more and more quick, agile projects with a DIY aspect and fewer larger full-service projects.*
>
> *Trying to do more agile market research – perception is that market research is slow/slows down innovation.*

In that same vein, automation was mentioned several times, adding to the general sense that respondents are having to work quickly and efficiently to keep up. No themes emerged from the comments to shed light on what's driving their focus on speed and efficiency. In past years it's been down to the old "better, faster, cheaper" mantra but this year it just feels like researchers are under the same strains affecting those of us living in this digital age: everything everywhere all at once.

> *We are constantly pressured to automatize our work and provide quicker results but also a wider perspective. In this regard, we are pushed to work more often with big data rather than do research from scratch. Also, we are encouraged to adopt as many things that are presented as being innovation or emerging tech.*

Another notable change is a movement away from mass surveying and its anonymous outputs and toward more personal forms of data-gathering, chiefly qualitative research-based, which offer the twin merits of immediacy and vitality. After all, nothing brings a consumer segment to life better than a video clip from a one-on-one or a focus group.

> *Likely moving away from traditional feedback surveys and moving towards qualitative (IDIs) with customers. Definitely moving away from a big market/competitive study.*
>
> *Emphasis will be on getting authentic video content as opposed to purely large-sample-size quant studies.*

Still, not everyone is seeing qualitative approaches win out.

> *Sadly, I think current trend will continue – less deep ethnography and robust qual to deeply understand customers and more monitoring of buzz, aka "real-time insights," which aren't true customer insights at all, just a bright shiny superficial appearance of customer "closeness" that creates a ton of busywork and churn but is useless for making critical strategic decisions.*

Also, more interest in being predictive rather than reactive.

> *Anticipate trends and translate them into a competitive advantage, use big data to generate insights, look into generative AI.*

And in the spirit of "a journey of a thousand miles begins with a single step," one hopeful soul offered this assessment of their biggest upcoming change:

> *We expect to conduct research for the first time in several years.*

There were mentions of hiring more staff (yay!), getting innovative by adding new tools to the toolbox and some plans to move to or incorporate non-research-gathered forms of data:

> *Pivot from original market research to CX, social media listening, mining complaints data, etc. Elimination of research-based approaches, looking to replace with transactional insights.*
>
> *We are making increased efforts to integrate our market research data across functions and with other types of data (operational, social media, complaints and grievances, etc.).*

As always, budgets loom as a concern.

> *Cost-cutting; fewer big projects; cheaper surveys. No longer understand what it takes to get true insights, not answers to basic superficial questions.*
>
> *I'd like to be part of the strategic planning and budgeting process. Failures to budget and understand what is involved in doing research correctly (and the steps involved and the time it takes) are prevalent.*

But on the flipside, there were reports of expansions of the marketing research budget!

> *We are heavily investing on our ability to more strongly evangelize our research, connecting the dots on CX and CI, building out a team to support a new line of business that is the future of the company, hiring talent and training to help us think long-term. More than one thing but there is a lot going on within our team!*

How would you improve communication?

We asked respondents to think of a time when internal stakeholders didn't include the insights function in important business decisions and gave them a list of possible reasons. At 26%, lack of awareness of the insights function's capabilities was the top choice, followed by stakeholders using other internal data to understand the issue (21%), the insights function being viewed as too slow (16%) and stakeholders not seeing the value in gathering customer feedback (12%).

How do you turn the tide on all of the above? Better communication!

We asked readers an open-end about the areas in which they'd most like to improve their communication with internal audiences and stakeholders. A critical part of communication, of course, is language and in reading through the verbatims it's clear that, just as politicians (or, more correctly, their consultants and PR handlers) have become masters at using language to frame issues (Republicans say "illegal aliens," Democrats say "undocumented workers"), so too might it benefit researchers to listen to and try to change the ways marketing research is talked about within their organizations. For example, instead of being used to kill ideas, research is for reducing risk; rather than a cost on a balance sheet, research is an investment in success; using research to bolster decision-making is smart, it's not an indication of weakness.

> *Most just want to use their gut. Some see the need for research as a sign of an inability to think for themselves.*

Whether it's for new product development or testing an ad campaign, several readers said they'd love to drive home the point internally that research should be seen as part of the process, not a late-stage afterthought.

> *I would like to do a better job of conveying the importance of including insights early in the decision process and starting with survey objectives and a data analysis plan. Too often, stakeholders e-mail me a Word document with a list of questions and ask me to do a survey.*
>
> *Need to get in the cycle earlier instead of finding out about projects/changes late in the game.*
>
> *Need to increase awareness of insights team so we are seen as the first step in any process to gather customer insights or develop products.*

AGILITY IS NOT A REPLACEMENT FOR KNOW-HOW

By Lauren DeRaleau
Head of Research and Strategy, Glass

Rapid iteration is powerful and freeing. Psychologically alone, it's incredibly effective at unlocking the overwhelming task of getting it perfect and instead freeing us up to try something, evaluate it and then tweak it for the better.

Long before the research industry fell in love with the word "agile," the tech industry was already there. Software development, working cycles, thinking and evaluation strategies focused on agility, with a respect for progress and speed above having the end goal fully visualized.

In a time of "doing more with less," anything that allows for that speed, price and efficiency wins. So, it's not surprising that we've excitedly adopted the concept of agility into our research. Learning as you go, not being caught up in red tape as you work, having answers soon after you have the question – that's powerful stuff.

I'm not sure, however, that we spend enough time talking about how risky it can be.

Rapid iterative research, fast feedback loops for directional answers – these aren't new. These have long been used to complement the business process they're informing. Within the past ~three years, I've seen the concept of "agile research" used increasingly as a solution to the bureaucracy, cost and slowness that bog down company innovation and decision-making processes. In some of these cases, instead of becoming a powerful tool, "agile research" starts to take over the whole toolkit.

As researchers, we know not all answers are created equal. Rapid information can be incredibly disorienting without the right context. Having an "answer" can be very powerful – whether or not it's the right one.

I had a brainstorming session with my team on all things agile research. What we spent our time discussing boiled down to three major themes:

1. **Agility requires the freedom to change direction and use multiple tools.** One of my team members had the experience of her past company "investing in an agile research platform." This unlocked a great tool and inspired new working styles but the subscription cost also meant less ability to afford other tools and there was a push to use this new platform as much as possible to prove the ROI. We wondered, if a significant upfront platform investment is required to do agile research, how agile are you left being across your research and decision-making toolkit?
2. **The fastest route to information and answers is to have them already accessible.** Building the ongoing research programs (e.g., CX, tracking, syndicated) that put pertinent information at-the-ready, while not agile systems themselves, are key enablers of an agile workplace. Setting up ways to get those ongoing insights in the hands of decision makers enables improved decision-making instantly. Democratizing the data and insights already available is something we talk about a lot as an industry but maybe not as much as we should within the framework of agility.
3. **Having access to tools that give fast answers does not work if you're not asking the right question.** The breadth of methodologies we use as a research industry evolved because different questions need different approaches to get the right answer. And some decisions can't be informed by a traditional "question" at all!

So, at Glass, we're trying something different. We're making a bet that removing the expert – yes, a human one – isn't the only way toward a lower cost and faster timelines. What that looks like, for us, is:

- Technology that enables speed and cost savings, when paired with the strategy of an expert researcher, is incredibly effective – and can be incredibly agile.
- The ability to do true custom research so the work matches the needs and doesn't restrict the best possible approach.
- No subscription or platform fee so we're a tool in your toolkit and not forcing you to give up the choice of another tool that better serves another project.

Every company wants to be agile. Let's keep thinking on how research and insights best enable that.

Glass

www.useglass.com

> *"It can be overwhelming to feel like you have to convince an entire organization of the value of insights. If you can focus on illustrating that value to one or two partners, they can help evangelize and become advocates for the role of insights within an organization."*
>
> **RACHEL PRUITT**
> DIRECTOR, ENTERPRISE INSIGHTS OPERATIONS & CAPABILITIES
> TARGET

And a big aspect of doing that is trumpeting far and wide the reasons why internal clients should WANT to get research involved at the outset.

> *Ensuring they understand our capabilities and value-add and the importance of including us at the very beginning of the process.*

> *[Need to communicate internally] about the breadth of our capabilities and the varying ways in which insights can improve outcomes and decision-making.*

> *While we have strong CX buy-in from our highest-level executives, I think on occasion some leaders fear that the CX/VOC data will show a result that works against what they really want to do for revenue or other purposes. While we've done a good job of showing that we have the best interest of the company and other departments in mind, I think anything that would help us continue to prove that we are a partner and not a barrier would be beneficial.*

How do you do that? Readers have some ideas.

> *Continued conversations with as many stakeholders and departments as possible.*

> *We have a fairly good approach to communicating value. Global blog posts on our function and lunch-and-learns seem to work.*

> *Increased dashboards and data visualization tools for stakeholder teams, streamlined reporting.*

> *We meet quarterly with executive team to update on projects and trends.*

> *More work needs to be done on storytelling, providing recommendations and helping push forward change based on insights.*

> *Get them to see that research (because we are a separate P&L) are not "taking" client's budget from them; we are hoping to build client's spend over time so everyone gets a bigger slice of the pie.*

Related, our survey respondents talked about the need to communicate that saving money by NOT doing research can end up costing a lot of money in the long run when untested products or services fail in the marketplace.

> *Budget constraints are big here this year. Not sure how to communicate that making decisions without consumer primary research can be a poor choice if we are relying on subjective internal opinions.*

> *The importance of customer feedback and how much more effective our features/efforts could be if we grounded them in solving for a customer pain point.*

> *Demonstrating that there are time-saving cases for using market research to gut-check creative decisions. Not all research has to be traditional or artisanal to get actionable results – I'm always looking for something that is flexible and fast.*

Though of course there are situations where research IS the final say, putting the researchers in the unenviable role of dream-killer.

> *Honestly, I would like to not have to say "no" to so many poor decisions. (Some colleagues call me Dr. No.) But the research data brings a lot of bad decisions down to Earth.*

Some place the onus on the researcher to bust out their communication skills to prove their value.

> *My unique situation is dealing with stakeholders that are desperate for research (they have seen the value since a lot of these individuals worked for sophisticated [tech] organizations) but sometimes they lack the understanding of what research can and cannot be used for.*

> *Sharing more of our capabilities and bringing them up to date on the fact that research investments don't have to cost so much and don't have to take so long. There's a lot of misinformation about these things.*

> *Pulling consumer understanding/insights through from marketing/*

> *media/creative all the way through to sales results for sales organization to leverage as evidence!*
>
> *Sharing less data and more data-driven ideas.*

Researchers can also further their own cause by doing the detective work to investigate how the company functions, who is in charge of what, etc.

> *[It would help to have a] better understanding of my employer's complex org structure to know who to make aware of insights capabilities; better understanding of what pockets of research already exist in the company.*
>
> *Need better understanding of other department needs and how the insights function can help them so that a "sales pitch" can be developed from making those connections.*

Despite their best communication efforts, sometimes the audience they're trying to reach simply isn't interested in what they have to say. Many responses fell into the "it's not us, it's them" category, with the "them" most often being the folks in marketing.

> *I think the problem is not about improving communication from my side or my dept. The real issue is that our company is too marketing-oriented, meaning that the marketing dept has a very, very hard time accepting that consumers do not like their ideas or proposals. Marketing people are not able to critically reflect on their work.*
>
> *Marketing dept is full of lifers who don't want interference with what they decide to do. Most uncooperative dept.*
>
> *Stakeholders don't like when data shows that they are performing poorly, so they prefer collecting their own metrics that make them look good.*

And sometimes there's only so much one person (and many insights functions are just one person!) can do.

> *It's a bigger issue than me. We need an overall ethos change in which research is valued and operationally inserted into product roadmaps and every department's strategic plan. It's not up to me to singlehandedly fix a system that is by and large ignorant of research.*
>
> *It would just be nice to be able to see action based on our research findings on the innovation side of things. We tend to be classified as more reactive than proactive and when we are proactive, it is not well received.*
>
> *Stakeholders have a vested interest in "leading" decision-making – even though we purport to be an "insights-led" organization.*

But thankfully, for many respondents, the communication work they've already done has things working pretty well.

> *I think my company has good communication among internal departments as it stands. For the most part, the insights function is viewed as important and we are included in business decisions.*
>
> *We have a solid, trusting relationship with our other departments. If anything, they would probably love to receive more insights from us for inclusion in decisions.*
>
> *My company has complete buy-in for the consumer insights function – they don't make decisions without it.*
>
> *My insights department is very visible and utilized by C-suite executives on a regular basis across the entire organization. When we are not used for something, the failures of the campaigns are corrected by the insights team and ROI is proven.*

How effective are the tools and methods available to you?

It feels like we are at an inflection point with marketing research tools and technology, with the impacts and capabilities of AI being explored and defined right now. Will AI fundamentally alter the marketing research process? Or will it join a number of other supposedly game-changing tools that were buzzed about and then faded?

We asked an open-end about the effectiveness of the tools that researchers do have at their disposal and what capabilities the respondents feel are missing from them. Overall, the researchers said the current tools are effective but a majority of the comments were of the yes-but variety, expressing some variation of the view that the tools and methods are fine but there's not enough time, budget or staff to get the most out of them.

> *I think there are a lot of great tools to deeply understand consumers but it does take time to do it AND communicate effectively, in a storytelling way, across the organization. I strongly believe that AI will enable us to accelerate and improve.*
>
> *Every day my consumer insights department is getting better and better at knowing who our customers are. Figuring out products that are avail-*

“We are exploring ways to incorporate AI algorithms to draw broad insights from disparate data sources. This will help automate some aspects of our workflow to free up time for more fine-grained analysis.”

KURT SCHUEPFER
SENIOR MANAGER, DATA SCIENCE,
GLOBAL INSIGHTS & ANALYTICS
MCDONALD’S CORPORATION

> *able to us that we can use is our biggest challenge, [along with] doing research with a limited number of personnel. Not enough hours in the day.*

> *They’re effective … but our corporate overlords are too cheap to pay for them.*

> *We are 90% DIY. There are three of us. It can be overwhelming to get everything done. Efficiency with one tool suffers when I need to switch gears and work with a different one, e.g., quant then qual and then develop report/presentation and socialize. I sometimes need to relearn functions within platforms as I go back and forth quite a bit.*

Some comments were reflective of the niche the respondent works in:

> *Our targets are typically older, less affluent and in poor health, making it harder to engage with them digitally. Other high-touch methods (in-person, phone, etc.) are not always practical.*

> *My struggle is that I need something that is defensible to federal clients (who have concerns about data privacy) but is also lean and nimble enough that I’m not soaking my budgets with several-thousand-dollar costs outside of labor. We’re contractors, so those are things we have to “eat.” The time spent on less-efficient but cheaper tools can sometimes be offset by the fact you can bill that time.*

> *I think there are a lot of great tools for product marketers and market research. But when it comes to nonprofits and charitable giving, the tools don’t quite fit or are way out of budget.*

> *As a B2B organization, decision makers prefer face-to-face interactions with key decision makers and that is difficult to replicate with formal market research.*

And as with previous questions in previous Q Report surveys, worries about response rates, sample and fraud were commonly expressed.

> *I mainly question survey respondent quality. The traditional survey panel method/online 15-minute survey feels very outdated but I have found few viable alternatives. Some exist but get very costly when you need meaningful sample size.*

> *[Tools are] somewhat effective but open to great risks associated with bots, fraud. We need better representation of our customer base and the market that’s quick and cost-effective but also with controls building to reduce the risks of fraud.*

> *I think the capabilities in the industry are broadly there and evolving at the same time. My take is the industry evolved in a way that capabilities are less about solving specific problems and more about emphasizing bright and shiny objects. And sometimes, the level of investment does not match the business importance of the research objectives.*

Also a variety of comments along the lines of “the tools are fine; the organization’s the problem.”

> *We should be able to understand natural language from customer feedback instead of using closed questions. Some of the main problems/pains are not listed or don’t represent customers’ feelings and it takes time until we*

“Understanding the implications of new tools is a primary way that vendors can prove their value to client-side researchers. It doesn’t mean they have to develop new tools but they must develop a point of view so that they can counsel the client-side on what is worth the cost and what isn’t ready for prime time.”

CLINT JENKIN
SENIOR MANAGER, CORPORATE RESEARCH,
GLOBAL BRAND MARKETING
VANGUARD

REAL BUSINESS LESSONS FROM THE GENERATIVE AI FRONTLINES

By Neil Dixit
Founder and CEO, Glimpse

By Adam Bai
Chief Strategy Officer and Chief Client Officer, Glimpse

From one point of view, the generative AI mania has already crested. But in the research, marketing and content creation spaces, the real drive for adoption at the team and organizational level is about to begin.

Organizations will soon begin making important decisions based on recommendations from large language models (LLMs). They'd better be sure that those recommendations are based on sound foundations and proven techniques. One problem: LLMs are simply not configured right out of the box to help researchers, marketers, advertisers and creators develop actionable insights or differentiated campaigns.

Why? Generative AI is a predictive technology and its training data sets in our industry are sometimes outdated or limited. Outdated because the training data isn't updated frequently enough to meet the needs of professionals. Limited because training a model on publicly available internet chatter means ignoring all the opinions, emotions and behaviors that aren't easily scrapable from public sites and platforms.

Without additional relevant first-party data to pull from, it can lead to unrepresentative recommendations, strategically misleading suggestions and even biased or discriminatory outcomes. When drawing on the immense power of LLMs, Glimpse always layers in high-quality, first-party, representative and real-time data, using a set of proprietary (and extensively tested!) techniques to build context around the prompt.

Our clients benefit from this added context as they use the platform to analyze data, create topics and nuanced summaries, generate key messaging (tailored to the needs of particular segments and personas) and generate personas to help them answer the questions that matter.

Client case

Wells Fargo Bank + National Foundation for Credit Counseling (NFCC)

Wells Fargo Bank and NFCC recently launched a study about housing insecurity to 2,000 American low- and middle-income renters.

The use of generative AI to analyze thousands of open-ended responses revealed that the dominant emotion associated with eviction was sadness. But it also revealed a strong undercurrent of optimism about financial recovery and housing ownership, particularly within communities of color.

Generative AI adoption tips

Here are four principles – based on a lot of Glimpse's generative AI-powered client work – for any organization:

Focus on inputs and outputs.
Generative AI capabilities are shockingly impressive. But it's important to remember that successful adoption will also depend on high-quality, representative training and testing data and the careful application of gen AI outputs to specific business or research challenges.

Think longitudinally (to track change over time).
In the age of generative AI, historical data is even more valuable than ever before. It allows us to train our models to become more nuanced and effective within the context of our own business challenges.

Strive for a holistic approach.
Generative AI can be applied to any data source to find patterns, spot opportunities or warning signs and help develop insights. It can help discover relationships between data sources, like social listening, first-party customer or sales data and survey data.

Ask the right questions about your teams, talent and processes. Starting right now!

- Are there urgent business or research challenges that generative AI can uniquely help us solve? Or are we following a trend without considering its value?
- Do we have the skills/capabilities/talent on our team right now to use generative AI tools effectively? Do we have people adept at providing context to generative AI processes and then intelligently applying its outputs to business challenges?
- Does process or team structure need to evolve? The answer is almost certainly, yes!

Glimpse

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realize we are not capturing the real problem. In addition, in our org, CX and insights are not sufficiently integrated/could create more synergies to get a better and faster understanding of customers.

The company prefers to do most things DIY and it takes so much time from the actual research. They are very hesitant to spend any money on tools because they have been doing it this way and it has been incredibly difficult in challenging the status quo when you're the only one challenging it.

> *"We naturally place so much emphasis on the research itself and the capabilities we're using to do that research. We need to place just as much importance on what comes before and after the research. 'Before' in ensuring we truly understand the needs of the business and our partners, helping our partners to see the role research and insights can play in addressing those needs and getting us closer to our business goals. 'After' in taking the time to translate the research into the so-what, now-what. And those will likely look different depending on the business partner we're talking to. We need to help our partners understand what to do as a result of our learnings. Otherwise, what's the point?"*
>
> **RACHEL PRUITT**
> DIRECTOR, ENTERPRISE INSIGHTS
> OPERATIONS & CAPABILITIES
> TARGET

> *"[Communication] is a universal challenge for shared-service functions. Being a great researcher is just as much about your ability to see the business from the perspective of your stakeholders as it is getting to an answer. Lately I've been thinking about the objective here: Am I trying to help people understand what our team does? Break through with new departments to 'win' more work? Democratize data access around the organization? There are different tactics for all of these."*
>
> **BESSAM MUSTAFA**
> DIRECTOR, FAN INSIGHTS
> TORONTO BLUE JAYS BASEBALL CLUB

As to what they'd like to see in future tools…

We currently pay for a survey platform, which we're happy with mainly because it's cheap, and a text analysis tool, which we are, in my opinion, paying far too much for what we're getting out of it. I would love a cost-effective, easy-to-use text analysis tool. Everything else I'd like to be using is simply not feasible given our budgets – I have to fight to get people to cough up $6k for two focus groups.

> *"The [experiences expressed in the Q Report survey responses] reinforce that there is no right way for a company to use a research department! The question should be: How should research be done at this company? There are sooo many right ways to answer that question but it requires us to truly understand where our strengths as researchers intersect with what our company actually wants or needs from us."*
>
> **CLINT JENKIN**
> SENIOR MANAGER, CORPORATE RESEARCH,
> GLOBAL BRAND MARKETING
> VANGUARD

There needs to be an easier way for marketing researchers not versed in SQL or Python to append customer, transactional and operational data to survey data collected for richer insights. It's a steep learning curve and I'm hopeful generative AI can help with this challenge.

It's ever-evolving, right? In my current role, I see a need to be able to condense vast amounts of unstructured data and I think the next frontier is in figuring out how to report this data in a meaningful and concise way.

They are effective but we are missing/needing more help with social listening and compiling findings from open-end feedback and other data around experiences.

We gather significant information from digital/online customers, however we cannot gather the same level of information from retail customers who make up the majority of our player base. We need a full customer-loyalty program that tracks actual purchase spending at retail to really tailor our messaging and enhance our overall performance.

We (the industry) seem to be getting there. I'd still like to see more options for online platforms where analysis, insights-generation and reporting can become quicker through AI automation. It would be great to be able to spend less time reviewing responses and more time reviewing potential insights.

We tend to be stuck with DIY solutions because agencies tend not to be able to provide us with our niche audience with their panels. Always frustrating to see very interesting things being presented at Quirk's Events that I know we will never be able to do because of those limitations. I guess we get enough to understand customers but I would like to do more.

HIRING TIPS FOR MARKETING RESEARCH JOB SEEKERS AND RECRUITERS

By Stephen Griffiths, Brian Fowler and Caitlin van Niekerk

As the hiring landscape evolves, what are the newest trends among hiring managers, specifically those in marketing research? What best practices should job seekers and hiring managers follow during the hiring process in 2023?

The Insights Career Network (ICN) – a peer-to-peer volunteer community of over 800 insights professionals – conducted a series of 17 interviews with recruiters and hiring managers to answer these questions. The interviews revealed some intriguing insights about case study interviews, the evolution of remote work and the use of automatic video interviews, along with specific tips for seekers and recruiters.

Key findings

Growth of case study interviews. While behavioral interview questions are still the mainstay of the interview process, what is emerging is a new kind of interview: the case study. Rather than being asked to recount a past experience, interviewees are asked to do hands-on work: analyze and summarize data, create a presentation to present during a panel interview or create a learning plan for a senior-level audience. While this type of interview can be polarizing – many job seekers feel that these in-depth presentations include work they should be paid for – it is nonetheless popular among many hiring managers. One hiring manager put it this way, "I find I absolutely need case studies for individual contributors. By using a case study, for example, I learned that someone didn't have the necessary quant skills. In short, we found things that were not uncovered any other way."

Hybrid is the new normal, though research partners are more likely to offer remote options. In our interviews, we consistently found that hybrid work – requiring employees to work in the office at least a few days a week – is the new norm, even for many companies that hired remote workers during the pandemic. This transition to hybrid is especially common for client-side roles, many of which tend to have a large headquarters building that would otherwise be unused. This presents an opportunity for companies – more likely to be agencies and partners – who get a wider array of candidates when they choose to allow employees to work remotely.

Automatic video interviews are on the rise, though not as prevalent for insights roles. While the general hiring process is largely unchanged from the past 10 years – screening interview by HR, interview by hiring manager and then progressive interviews with other team members and leaders – there is one large exception: the advent of the automatic video interview. Candidates are sent a link and then asked to answer a set of questions while being automatically recorded, with a limited number of retakes. Many candidates find this method impersonal and nerve-racking and hiring managers see them as polarizing. While these types of interviews are most common for positions where there are lots of applicants (especially entry-level jobs), some hiring managers we spoke with opted to not use them because the number of qualified candidates for their niche positions was smaller and they worried the automatic video interviews would be a turnoff for some candidates. It does appear that these interviews can present a cost savings for companies (especially when analyzed by AI), so they are likely to remain a part of many hiring processes.

Growth of contract and project work. Many hiring managers we spoke to mentioned the increased use of contract workers for specific projects. While some job seekers are wary of such roles – instead preferring full-time positions that are more likely to provide bonuses and insurance benefits – some job seekers see these positions as a way to provide variety and flexibility in their lives. Of note, contract work varies widely across industries and companies. For instance, many large tech firms use contract work as a direct route to full-time hiring, often converting contract employees to full-time employees in three to nine months. Other companies use contract employees to temporarily fill a gap, with little chance of a full-time conversion. Job seekers would be wise to ask clarifying questions to determine if a contract position is likely to turn into a more permanent position when presented with contract opportunities.

ABOUT THE INSIGHTS CAREER NETWORK

Founded in early 2022, the Insights Career Network is the job search and career community for insights professionals. Currently serving over 800 members, the community includes marketing, consumer, user and business research professionals who volunteer their tools, experience and networks to help each other develop their careers. The ICN hosts Zoom meetings twice a month with guest presenters and networking time for job seekers, allies and hiring managers. It also offers a community-sourced list of active insight job openings with referrals (for job seekers) and an active list of job seekers (for hiring managers). Membership is free. Apply and learn more at insightscareernetwork.org.

Tips for job seekers

Although job seekers were not specifically interviewed in this research, there are a number of takeaways that we can share based on twice-monthly ICN meetings with hundreds of members and some basic implications from this research.

Focus on networking. Hiring managers repeatedly mention how candidates often come from internal referrals or those who make themselves known to the HR or hiring manager on LinkedIn. Although they can be uncomfortable, virtual coffee chats with company employees or direct outreach to a hiring manager through LinkedIn are still very effective ways to land that first interview.

It's worth tailoring your interviews and applications for each role. While it can be tempting to apply to as many positions as possible, hiring managers repeatedly talk about how going the extra mile helps candidates stand out. Although there is no single way to rise to the top of the applicant pool, hiring managers cite examples such as writing a customized cover letter (when no cover letter is required), tailoring your interview answers to the needs of the company and editing 10% of your résumé to match the job description as common ways to separate yourself. Job seekers would be better off networking and tailoring their applications for 20 positions than applying to a hundred roles with no customization at all.

Confidence and preparation trump meeting all qualifications. For competitive roles, it can be tempting to not even apply unless a job seeker meets all the qualifications. On the contrary, many hiring managers mentioned "passion and drive" as key qualities they were looking for – and that the job posting was at times a wish list. One hiring manager described it this way, "Sometimes we focus too much on technical skills rather than the ability to make things happen within an organization. For instance we almost hired someone who has good NPS experience but no track record of implementing change within a company." Hiring managers go on to suggest applying for a job when you have met 70% of the qualifications, noting that they would prefer to hire someone who was driven and proactive to learn the last 30% than someone who met 100% of the qualifications but was largely complacent.

METHODOLOGY

The Insights Career Network conducted 17 30-minute interviews with hiring managers and recruiters in the insights industry between March and May 2023 regarding recruiting and hiring practices at their organizations. Our three interviewers spoke with eight researchers and market research recruiters from leading brands, including six with a Fortune 500 perspective and three from mid-sized consumer and B2B brands. For the partner perspective, we connected with recruiters and hiring managers in advertising and research agencies, platforms and leading insights recruiting partners.

Tips for hiring managers

A number of themes emerged from hiring managers for how to improve the hiring process in general.

Be candid with candidates. One head of insights shared, "Give an accurate description of the role and company – don't sugarcoat it to the candidate. Encourage transparency so it can be a good fit from the start." While many hiring managers try to paint a rosy picture of the organization and position to new candidates in an effort to persuade them to accept the role, this often backfires three months in when the candidate learns the truth and leaves. Instead, be honest with candidates up front about the work hours, a difficult stakeholder or pace of work. Better to get fewer candidates moving through the interviews as long as they are a better fit.

Consider case study interviews to evaluate technical skills but don't overdo it. If using a statistical package or detailed Excel formulas is a key part of the job, consider asking candidates to do this kind of work as part of the interview process. "If there is a highly technical role, we might do a small case study … we don't want to create an interview process where candidates are doing large amounts of work for free."

Ask candidates to present material to gauge presentation skills. One hiring manager shared how a new hire wasn't the right fit, largely because the new hire couldn't present well to a senior audience. When interviewing for more candidates, the hiring manager asks the candidate to prepare a few slides and have a senior stakeholder attend the mock presentation during the interview process. Sharing analysis and slides during the interview process is becoming more common.

Stephen Griffiths is consumer insights director at UnitedHealthcare (Level2) and a co-founder of ICN. Brian Fowler is a strategy consultant and co-founder of ICN. Caitlin van Niekerk is client development manager at Quantilope and an ICN member.

BACK TO BASICS – WHAT AI DOESN'T DO FOR QUALITATIVE SUPPORT SERVICES

By Meghan Surdenas
Partner, SyncScript

If you've been to any market research conference or symposium, you've heard a lot of information on AI. It has transformed how some people work, streamlined many processes and aided some administrative tasks; but does anyone remember blockchain? The environment surrounding this technology is eerily similar: exponential growth, limited oversight and governance, a fundamental lack of accountability and a whole lot of industry buzz.

Is AI the new blockchain?

"AI won't take your job – if you know how to use it," economist Richard Baldwin said at the World Economic Forum's Growth Summit. Fundamentally, AI adoption is simple. It's technology that can be used to your advantage, as another tool in your toolbox. However, it is crucial to recognize the limitations of AI in research and how it falls woefully short in delivering the essential human touch. The value of researchers and research support personnel cannot easily be replaced. People still matter.

Qualitative recruitment: The new online dating

At its core, a qualitative project seeks to deeply understand the human condition and is far more complex than simply identifying suitable respondents based on objective criteria. Remember dating in high school and beyond? A person may look great on paper (or online these days), but an expert recruiting firm has people-centered processes that ensure respondent selection meets project goals with respondents who are articulate and engaging. It involves understanding individuals' unique experiences, motivations and interpersonal skills where people can make informed decisions based on comprehensive insights beyond surface-level data. AI algorithms struggle to decipher subtle nuances, nonverbal cues and emotional intelligence that are vital to research quality standards.

Successful qualitative recruitment requires boots on the ground to ensure respondents will offer the insight for a successful outcome. Say goodbye to recruiting from the database. Recruiters need to get creative when needed, networking, researching, utilizing partners and old-fashioned handshakes. Difficult recruitment projects can be a puzzle and AI isn't able to handle the nuances of that yet.

Transcription: The human touch

AI transcription isn't new technology and is primarily designed for consumer interviews with common English. While AI does a decent job recognizing words and generating verbatim transcripts, it often struggles with different accents, dialects, contextual nuances and multiple speakers. AI systems may misinterpret homonyms, idiomatic expressions and technical or medical jargon, leading to inaccuracies and misrepresentations.

There is no substitute for human transcripts. Need the sleek sophistication of an Excel transcript? Good luck with AI. Client-specific formatting? AI can't do it. That notwithstanding, there is also a growing need for a human review to create a client-ready transcript: looking up industry specific terms, following detailed delivery and formatting instructions. Human transcriptionists, with their contextual knowledge, linguistic expertise and cultural sensitivity, can better decipher these nuances and provide accurate and meaningful transcripts.

Data analysis: Trust but verify

AI algorithms can be a standout in synthesizing structured data and identifying patterns but fall short in interpretation with unstructured information. Human analysts possess the ability to delve deeper into the data and provide valuable insights that go beyond statistical correlations. They can identify hidden patterns, discern underlying consumer behaviors and offer a more holistic understanding of market dynamics, which aids in strategic decision-making.

Project teams rely on real experience to provide valuable context to the data, considering factors such as macroeconomic conditions, competitive landscapes and consumer sentiment, which is crucial in generating accurate and actionable insights.

Here's a secret: This article was initially generated by AI. It was excruciatingly elementary, devoid of any finesse. Given that, AI did generate the kernel of an idea, which led to collaboration with colleagues. Full disclosure? My longest-standing colleague in research generated the real message. People and relationships still matter.

SYNCSCRIPT

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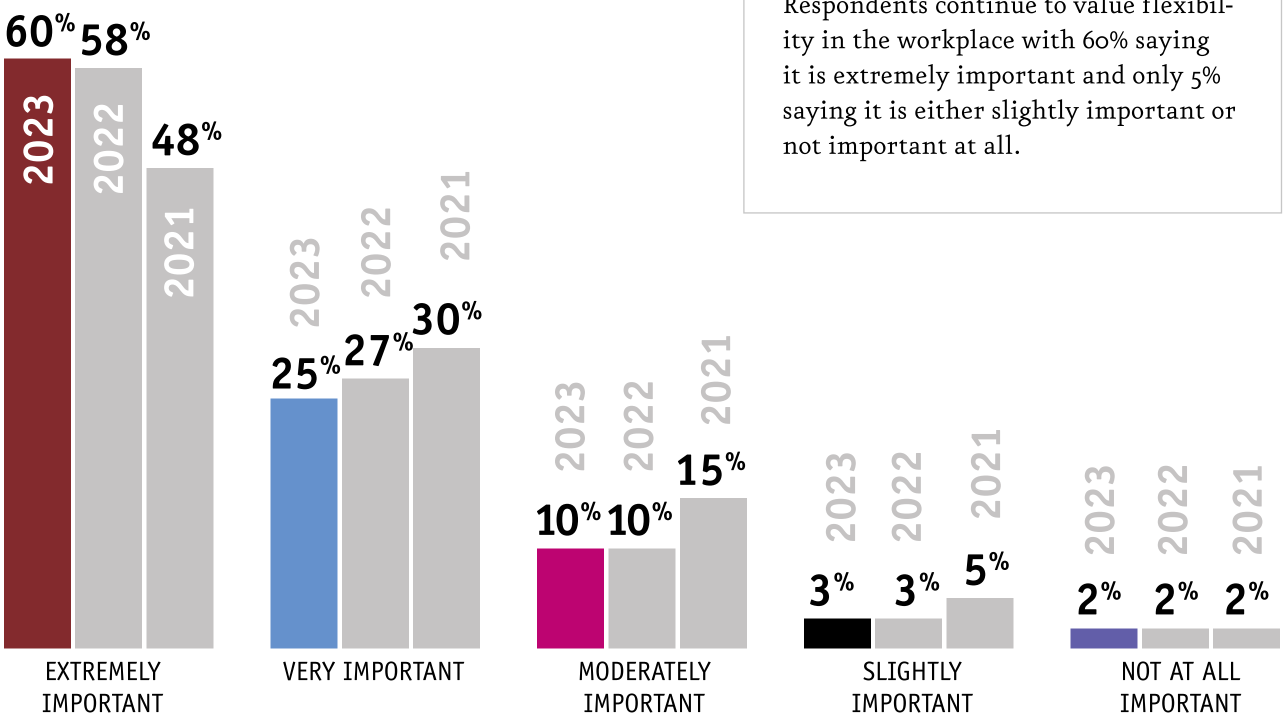
RESEARCHERS SATISFIED BUT SEEK RECOGNITION

By Marlen Ramirez >> Quirk's Media

The Quirk's annual Q Report aims to understand client-side researchers and see what is on their minds. The Q Report looks into a range of topics including education, hiring trends and shifts in employment.

The 2023 edition of the Q Report received 707 usable qualified responses from full-time (defined as 35+ hours per week) client-side insights professionals from May 24 to July 10. We highlight interesting pieces and share respondent comments throughout but mostly let the data speak for itself. A breakdown of compensation including mean base salary, bonus, dividends and other forms of compensation can be found at www.quirks.com/tools/salary-survey. Twenty-four end-client marketing research titles are included in the results. Titles with over 10 respondents also contain crosstabs by age, gender, industry, location and more.

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



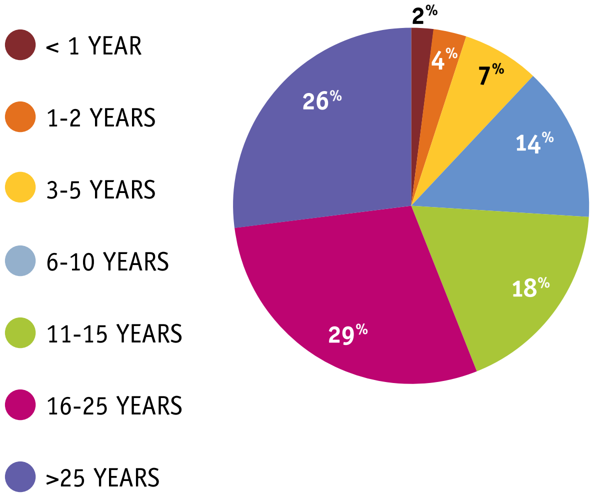
Importance of flexibility

Respondents continue to value flexibility in the workplace with 60% saying it is extremely important and only 5% saying it is either slightly important or not important at all.

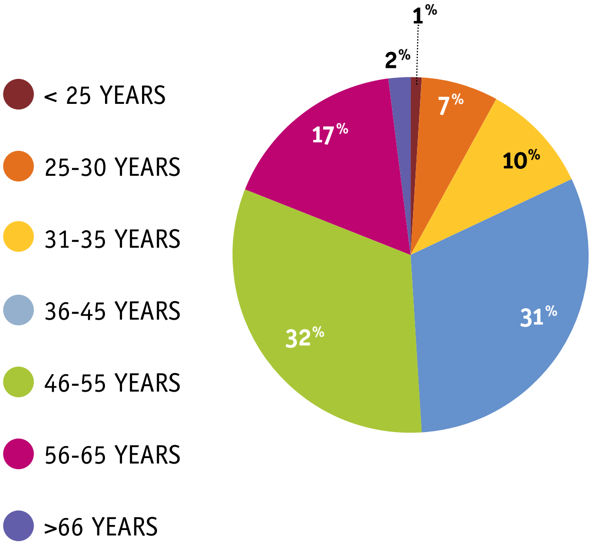
DEMOGRAPHICS

This year, the majority of respondents (29%) indicated having 16-25 years of experience in the marketing research industry. Twenty-six percent of industry professionals have over 25 years of experience, 18% have 11-15 years and 27% have been in the industry for 10 or fewer years.

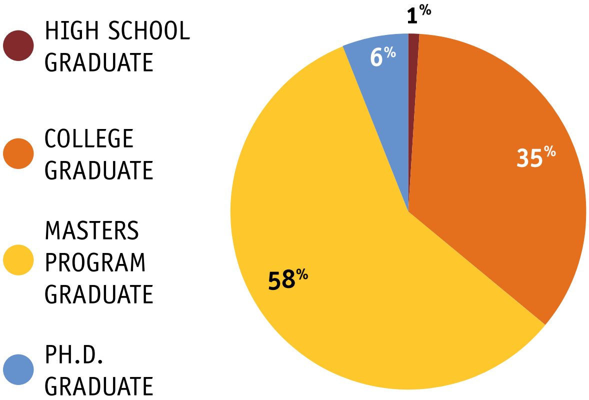
How many years of experience do you have in marketing research?



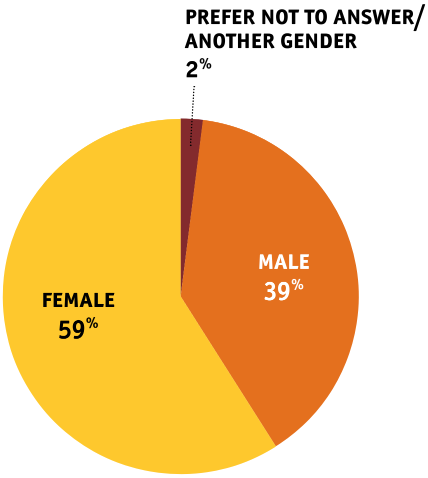
What is your age?



What is the highest level of education you have completed?



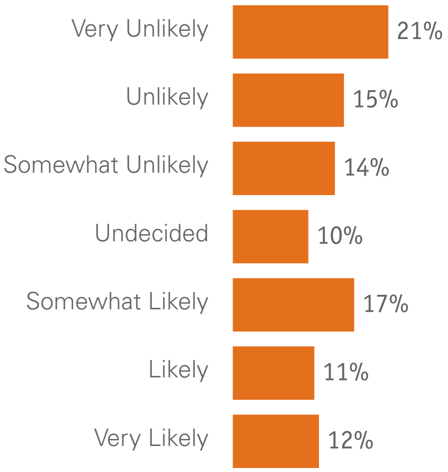
How do you identify?



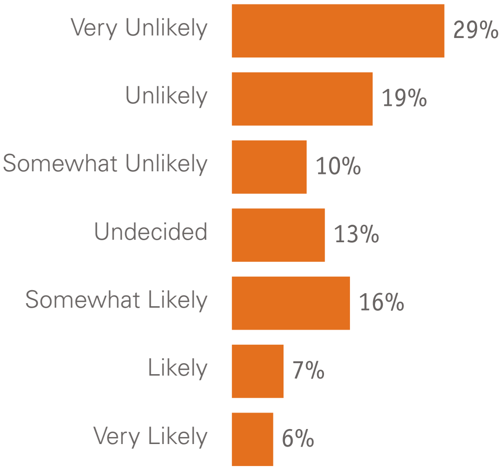
CHANGES IN EMPLOYMENT

The likelihood of hiring additional permanent marketing research employees has dropped nearly 10% compared to last year. In 2022, 49% of respondents indicated that their companies were somewhat likely, likely or very likely to take on more permanent staff, compared to 40% this year. The majority of respondents (29%) indicated that their companies are very unlikely to hire additional contract research employees in the next 12 months.

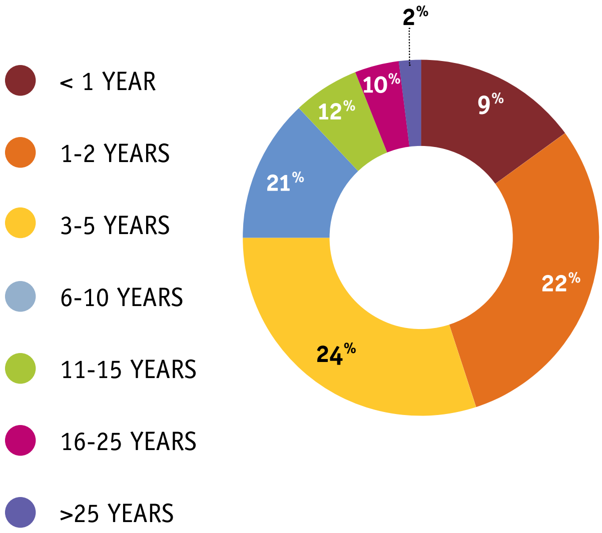
How likely is it that your company will hire additional permanent market research employees in the next 12 months?



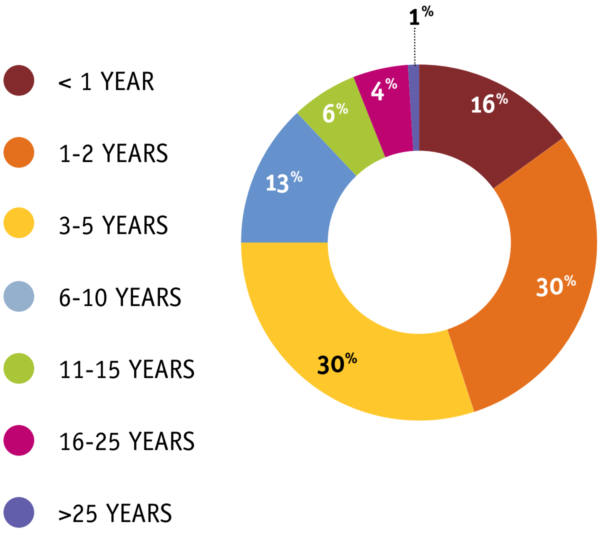
How likely is it that your company will hire additional contract research employees in the next 12 months?



How many years have you been employed at your current organization?



How many years have you been in your current job?



HOW MUCH TO PAY RESEARCH PARTICIPANTS BASED ON STUDY LENGTH, CONTENT AND INCENTIVE TYPE

By Ian Floyd
Head of Research and Insights,
Tremendous

Considering extending your study or survey? That may be less expensive than you think. According to our latest research, surveys become cheaper minute per minute as they get longer.

We partnered with The Decision Lab (TDL), an applied research and innovation firm specializing in human behavior, to determine exactly how much researchers should be paying participants based on length of study, the content of the research itself and incentive type.

Existing research on how much to pay research participants is typically descriptive – it lays out best practices based on rates researchers typically pay, rather than on how participants want to be paid. Our research is different. Using a series of discrete choice experiments, we discovered how participants expect and want to be paid, as well as how they respond to different kinds of incentives.

As a result, we were able to determine:

- When researchers are overpaying participants.
- When researchers are underpaying participants.
- How changes to the length and content of your research, as well as the incentive that comes with it, affect how much participants expect to be paid.

Long studies and surveys get cheaper by the minute

Participants, naturally, expect to be paid more for a 15-minute survey than for a five-minute survey. We found, on average, research participants expect to be paid about $17.62 more for a research task taking 15 minutes than a five-minute one.

Interestingly, though, we found that the longer your experiment or study runs, the cheaper each additional minute becomes.

For example:

- Say you're increasing the length of your study from five to 15 minutes. For these 10 additional minutes, each minute will cost you $1.76.
- Now, say you increase the length of your study from 15 to 30 minutes. The price of each additional minute is now $1.44.
- Finally, say that instead of 30 minutes, you decide to boost your interview time to an hour. Now, each additional minute will cost only $0.71.

While some researchers may worry about how increasing study length will impact participant motivation, it's pretty inexpensive to include additional questions while still fairly compensating respondents.

Studies that require human interaction are more expensive

Research participants, overall, prefer studies that don't require them to interface with another person. Consequently, people prefer online surveys over online interviews.

According to our research, participants expect about $8.66 more for an online interview compared to a survey.

Similarly, studies that probe into personal topics are also a bit more expensive than relatively surface-level inquiries.

However, if your study is short, you may not have to worry about the sensitivity of the topic.

- For surveys that are between five and 40 minutes long, the cost of a sensitive discussion and a surface-level discussion are almost equal.
- For surveys that are an hour or longer, the content of the discussion matters: Sensitive topics cost $9 more than less privileged information.

Cash is king

Overwhelmingly, research participants view cash as the most valuable incentive type.

Specifically, cash is at least $9.50 more valuable to participants than any other incentive type.

Comparatively:

- Mailed checks need to be $13.37 larger to be perceived as equally valuable as cash.
- Prepaid Visa cards are the next best option, largely because of their flexibility.
- Finally, gift cards of the participants' choice are the third-most valuable option to consumers. They'd prefer to choose their own gift card rather than receive an Amazon gift card.

Conducting studies and surveys about less-sensitive topics, and thanking participants with cash, will likely be the best bang for your buck.

This is just a cursory look at our findings. For a complete analysis of our research, head to tremendous.com on October 1.

TREMENDOUS

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JOB SATISFACTION

A combined 76% of respondents say they are somewhat satisfied, satisfied and very satisfied with their current employment. When asked about the changes they expect their companies to make over the next year, many mentioned an increase in conducting research and incorporating AI:

> *Currently providing more expansive services than market research; goal is to focus more on research in the next year.*
>
> *Hopefully using AI to work with unstructured data to improve CX insights.*
>
> *Conducting more research fully in-house.*
>
> *Integrating the usage of generative AI in making our workflow more efficient and delivering timely results. Also moving away from project-basis work to real-time dashboards.*
>
> *We mostly do brand research, so the biggest change in our company is implementing more market research.*

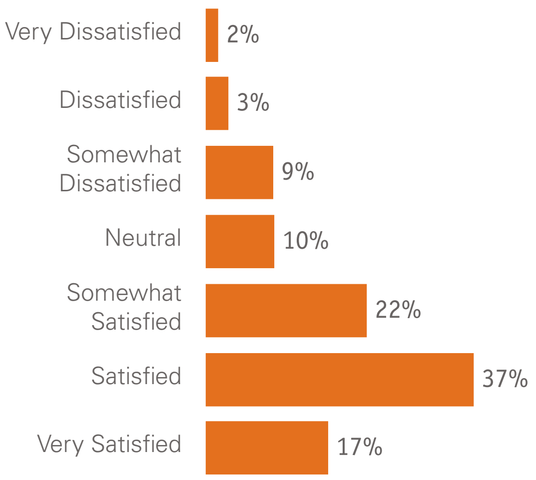
Others mentioned budget changes:

> *Our budget stayed flat (which is good) but we would benefit from hiring more staff. Given the current market conditions that isn't likely.*
>
> *2024 will be a year of cutting costs, finding efficiencies, establishing best practices.*
>
> *Providing more budgeting to complete proactive research.*

While changes in marketing research are expected, some simply want it to be recognized:

> *Hopefully recognizing the value of MR and paying more attention to what the MR function brings to the table in terms of business decision-making.*

How satisfied are you with your current employment?



METHODOLOGY

The Q Report work life and salary and compensation study of end-client/corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research subscribers of Quirk's. The survey was fielded from May 24 to July 10, 2023. In total we received 1,969 usable qualified responses of which 707 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.17 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

THE PERFECT PARTICIPANT DOESN'T EXIST…OR DOES IT?

By Jay Tye
COO, Echo Market Research

In the ever-evolving world of market research and now with the integration of AI, finding the right participants and ensuring their engagement and honesty throughout the research process is paramount. Fortunately, locating these participants is not as challenging as it may seem.

First, let's abandon the practice of referring to respondents as objects and instead regard them as individuals. After all, they are human beings and it's essential to humanize their role in the research process. By merely shifting our perspective, we can begin to see them as people.

For so many years they have served us, isn't it time we served them?

Research has always been a gig, we just didn't know it.

By reimagining the database model, we can establish an interactive network of consumers based on gig work principles – think Task Rabbit or Uber but tailored for market research. By adopting this approach, we can effectively tackle numerous persistent challenges related to participant and data quality. It aligns the recruitment process with the demands of our modern world, offering individuals multiple and flexible opportunities to earn money while fostering a network of genuine people with authentic opinions.

Implementing these changes ultimately eliminates the urge for participants to cheat the system or devise creative ways to bypass screeners. Instead, it creates an environment where validation is intrinsic. Moreover, by prioritizing the participant experience and allowing them to provide ratings and feedback on their research experience, you not only gain valuable insights but also build trust and rapport with them.

Why cheat when you can make money the honest way?

Better-quality experience, better-quality people.

While people are initially motivated monetarily, participating in the market research gig economy can be even more rewarding. This innovative approach has global reach for all types of studies, ensuring a diverse pool of participants while maintaining high quality standards. The promise of better-quality people participating in your research, with a robust participant pool, can help you find target audiences that are typically challenging to recruit. Furthermore, prioritizing the participant experience ensures that respondents are fully engaged, providing thoughtful and accurate responses.

Creating such an environment alone isn't the answer. While it certainly helps, there needs to be multiple levels to help build that two-way trust and respect. Giving participants alternative ways to earn and listening to their feedback combined with informing them of their rights is the sweet spot.

Championing participant rights

In a world where insights are constantly sought after, it is essential to give the utmost priority to the source of these insights – our participants!

Echo and other partner organizations have joined forces with the Insights Association to launch an initiative called the Participant Bill of Rights. This initiative aims to protect, inform and respect our industry's most valuable resource… our respondents! By prioritizing the rights of participants, market researchers can build a solid foundation of trust and mutual respect, leading to the acquisition of more reliable and insightful data.

We value your input and welcome your thoughts on this initiative. Please visit http://bit.ly/3Yi7u40 to share your insights and additionally, you can watch this short video (https://youtu.be/9vIzjM6Xga4) to learn more about what we're doing. The more individuals we have contributing to this discussion, the more cohesive and unified the participants' experiences will become.

Don't just take our word for it…

Echo Market Research firmly believes in "practice what you preach," which led us to develop a brand-new gig economy platform for market research called hivemind.zone. An innovative environment that prioritizes participants above all else and provides them with many different ways to engage with our industry beyond completing a focus group or taking a survey. Everyone involved in the platform undergoes a comprehensive 360-degree review process, ensuring complete verification and fostering trust and respect. As a result, this approach leads to more profound and accurate responses, enriching the research outcomes.

THEY win, WE win, YOU win…

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UNEMPLOYMENT IN THE INSIGHTS INDUSTRY

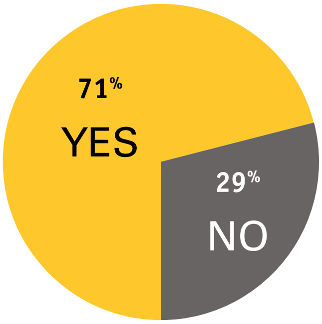
Seventy-one percent of those looking for a job are expanding their search outside of the marketing research industry. Of those unemployed in 2023, 35% are 46-55 years old and 22% are 35 or younger.

Those unemployed point to various challenges for finding employment:

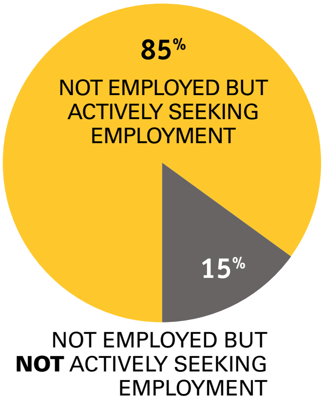
> *There seem to be too few roles for experienced people. I am disqualified from individual contributor roles because I have management experience and competing with the hordes for too few jobs in research management. Location is also a problem – I can't relocate – so that limits my options.*
>
> *Finding a position that is the right fit – finding senior-level roles is challenging as there are a more limited number of them. Recently, a number of companies have laid off employees following the hiring boom of 2021 and 2022. The job market has cooled a bit.*
>
> *Market research positions want advanced math and statistics degrees and/or experience with advanced stats software that is typically only available in those workplaces. While I have years of experience, my original degree was not in this field. I have found this common in many people of color in this field as well.*

> *Employers need experienced candidates [making it] difficult for fresh graduates [to] get employed! Secondly, the system of getting employed needs candidates with supportive people behind them (connection). Lastly, high competition for the position whereas one position is contested by more than 200+ applicants.*

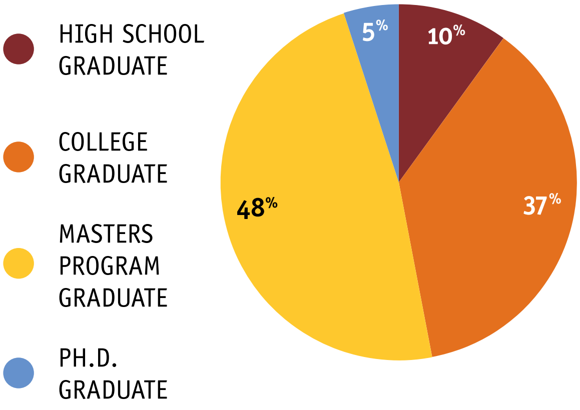
Are you expanding your job search outside of the marketing research industry?



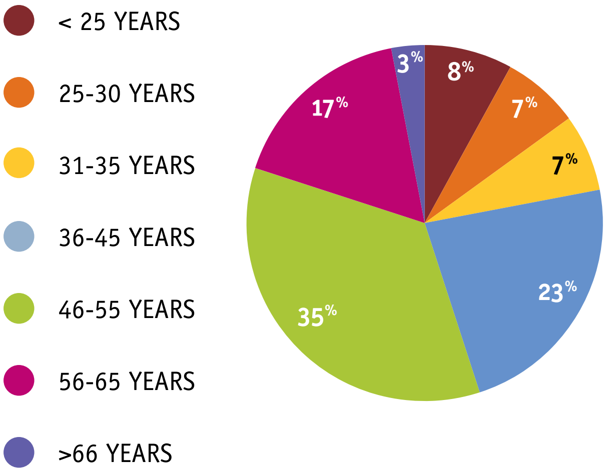
Which best describes your current job status?



What is the highest level of education you have completed?



Age of survey respondents



QUIRK'S TIME CAPSULE

Facts and findings from nearly 40 years of Quirk's

Quirk's MARKETING RESEARCH Review

Advertising research issue

Research and marketing make a "white hot" combination for Copper Mountain

March, 1991

Curse those pesky 'ski boarders'

The March 1991 issue contained a case study ("Retaining heat") detailing how chairlift-based one-on-ones and other forms of qual had informed Colorado ski area Copper Mountain's process of repositioning itself. The project was a pretty standard research success story but what really stands out to modern eyes is the brief mention of "ski boarders," a then-nascent group of snow lovers who were apparently ruffling feathers at resorts around the world (except for France, apparently, according to the internet), along with the helpful explanation:

> *To further enhance its image with the younger, cutting-edge skier, the resort has also opened its arms to ski boarders, who use a single board rather than two skis to "surf" down the slopes. "All the other resorts were discouraging people from ski boarding," Austin-Kelley's Lisa Durand said, "but research is telling us that the skier population is shrinking, so since we can't increase the size of the pie, let's increase our share of it, so Copper Mountain decided to encourage people to come and ski board."*

This was three years before the International Olympic Committee officially recognized, ahem, snowboarding and seven years before the sport made its debut at the Winter Games in Nagano, Japan. Given its dominance, it's hard to believe there was a time when "ski boarders" were grumbled at by downhill skiers for bringing a skateboarding culture to the slopes. Oh and the research must have helped: Copper Mountain recently celebrated its 50th anniversary.

1991

Somewhere, a Sunfire shines on

When the last Pontiac automobile rolled off the assembly line in January 2010, the marque disappeared from the market. Fifteen years before that, a 1995 case study ("Igniting the Sunfire") detailed how collages made by focus group responses gave ad agency creatives insight into imagery, language and lifestyle aspirations of potential buyers of the Pontiac Sunfire, an entry-level car "aimed at younger drivers who want a sporty car but can't quite afford one."

Targeted TV spots touting the car as a ticket to adventure grew out of the qualitative research findings.

> *"We knew we had to do something different," said Gary Martin, D'arcy Masius Benton & Bowles senior vice president and group media director on the Pontiac account. "The typical Sunfire prospects watch television, but quite selectively; they read but not the broader-circulation publications. They are into fitness and music and spend a lot of time in their cars. Many are still in college and are impossible to reach with direct mail."*

A long time in the field

Time is often of the essence in marketing research but in another 1991 case study ("Walking a fine line"), taking two years to gather data worked just fine for helping Stiefel Laboratories confirm that a packaging redesign of its Oilatum soap might be a good idea. The soap, intended for users with dry, sensitive skin, was generally purchased on a doctor's recommendation but accumulated responses over two years to an in-package questionnaire revealed that 10% of the soap's users bought the soap on impulse, leading Stiefel to suspect that an updated look might attract more impulse purchases. No time like the present, right?

Scan to access all Quirk's back issues.

CALENDAR OF EVENTS

••• can't-miss activities

Strategy Institute will host the Annual Data Analytics Summit on **September 13-14** in **Toronto**. Visit dataanalyticspublicsectorsummit.com/about.

Worldwide Business Research will host eTail Connect Autumn U.K. on **September 13-14** in **St. Albans**. Visit etailconnectautumn.wbresearch.com.

Forrester Research will host Data Strategy & Insights on **September 13-14** in **Austin**. Visit www.forrester.com/event/data-strategy-and-insights.

TTRA will host the Canada Annual Chapter Conference on **September 13-15**. Visit ttra.com/canada-chapter/2023-conference.

We.CONECT Global Leaders GmbH will host the Big Data Minds event on **September 17-19** in **Berlin**. Visit www.big-data-minds.com.

Quirk's Media will host Wisdom Wednesday on **September 20**. Visit www.quirks.com/events/wisdom-wednesday-webinars-september-20-20232023.

Strategy Institute will host the Annual Customer Experience for Financial Services Summit on **September 19-20** in **Toronto**. Visit www.cxfinancialservices.com.

Worldwide Business Research will host eTail Australia Connect on **September 19-20**. Visit etailconnectaustralia.wbresearch.com.

Pharma Market Research Conference will host the Pharma CI Conference and Exhibition on **September 20-21** in **Newark**. Visit pharmaciconference.com/usa.

Market Research Society will host the B2B Research Conference on **September 21** in **London**. Visit www.mrs.org.uk/event/conferences/b2b-research-conference-2023.

World Association for Public Opinion Research will host the Annual Conference on **September 19-22** in **Austria**. Visit wapor.org/events/annual-conference/current-conference.

Marcus Evans will host the Machine Learning in Quantitative Finance event on **September 20-22**. Visit www.marcusevans.com/conferences/quantfinanceml.

Informa Connect will host Marketing Analytics & Data Science on **September 26-28**. Visit madsconference.com.

Worldwide Business Research will host eTail Canada on **September 27-28** in **Toronto**. Visit etailcanada.wbresearch.com.

Empresarial will host Printemps des Etudes Trade Show on **September 28-29** in **Paris**. Visit www.printemps-etudes.com.

Marcus Evans will host R&D Controlling & Performance Management on **September 27-29**. Visit www.marcusevans.com/conferences/rndperformance23.

Generation1 will host the Fall Insights Career Fair and Case Competition on **September 29**. Visit generation1.ca/2023/06/15/fall-2023-virtual-insights-career-fair-and-case-competition.

Corinium Global Intelligence will host CDAO Malaysia on **October 3-4**. Visit cdao-my.coriniumintelligence.com.

Mystery Shopping Providers Association will host the CME conference on **October 3-5**. Visit members.mspa-americas.org/events/Details/cme-2023-colorado-springs-co-771619.

QRCA will host the Worldwide Conference on **October 4-6** in **Lisbon**. Visit www.qrca.org/page/worldwide-conference-central.

We.CONNECT Global Leaders GmbH will host CimiCon Evolution on **October 4-6** in **Berlin**. Visit www.competitive-market-intelligence.com.

Corinium Global Intellligence will host CDAO Fall Boston on **October 4-6**. Visit cdao-fall.coriniumintelligence.com.

Merlien Institute will host its MRMW Europe event on **October 9-10** in **Berlin**. Visit eu.mrmw.net.

Marcus Evans will host PharmaMarketing Europe Summit on **October 9-10** in **Cannes**. Visit www.october23.europe.pharmamarketingsummit.com.

Quirk's Media will The Quirk's Event Virtual – AI on **October 18-19**. Visit www.thequirksevent.com/virtual-global-2023.

Quirk's Media will host the Marketing Research and Insights Excellence Awards on **November 14**. Visit www.quirksawards.com.

Event details as of July 27, 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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Executive Director, Warner Bros. Discovery

> *"I encourage researchers to adopt a more human-centered approach when thinking about survey development."*

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

How did you first become interested in marketing research and insights?

My educational background is in psychology, which nurtured my fascination with understanding why people think the way they think. At the start of my career, I was naturally looking for opportunities to tap into that background and curiosity.

My first professional role was at Mattel, where psychology, especially child development, was critical in how we conducted research and interpreted findings. This was a particularly formative experience, as we had to develop new approaches and methodologies for a unique audience – children – where many traditional market research techniques, often optimized for adults, were simply not feasible.

To this day, my passion still revolves around understanding why people think the way they think, and how that translates into why they do the things they do, why they buy the things they buy and why they watch the things they watch.

What advice would you offer to a researcher who is just beginning their career in quantitative research?

I encourage researchers to adopt a more human-centered approach when thinking about survey development. Imagine a survey as a conversation with a consumer. What language would you use? How would you ask questions? Can the language be more colloquial and less clinical?

I'm also a big fan of infusing more derived questions – not just stated questions – into a survey. They could be trade-off questions, bipolar scales, discrete choice, conjoint, etc. And what if we took inspiration from the projective questions or exercises often used in qualitative research and translate them into a survey? Could that be more insightful and feel more engaging for survey takers?

Of course, survey platforms are part of the equation; I encourage researchers to experiment with platforms that have a more natural and engaging UI for traditional questions. Bonus points for platforms that are not just mobile-capable, but mobile-first!

Could you share a new research tool and/or methodology you hope to use in 2024?

I have many things on my wish list! For example, I'm hoping to implement more powerful tools that will enable us to code open-end, unstructured responses, whether in video, audio or text format, at large quantitative scale. My hope is that improvements in NLP will one day enable us to deploy "surveys" comprised of nearly all open-ends.

Another area is in leveraging image-generative AI – not for us as researchers to generate images, but as a tool we task consumers with, to show and tell us what they would like to see and why. This allows consumers another mode to articulate potentially more latent attitudes and needs.

I also hope to conduct ethnographic research inside online worlds/metaverses such as Minecraft, Horizon Worlds and Fortnite, to more deeply understand in situ why these experiences are so relevant for their users.

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