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For marketing research and insights professionals

## FOR INSIGHTS

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Face to face research is an essential piece of the insights puzzle. By conducting research in person, you gain added context from body language, a more fluid group dynamic and added security and privacy measures. The right research environment for brands to uncover and explore insights that result in important business impact.
**Aryn O'Donnell, Vice President of Fieldwork**

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

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

# #facetofacemrx

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

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

# CONTENTS

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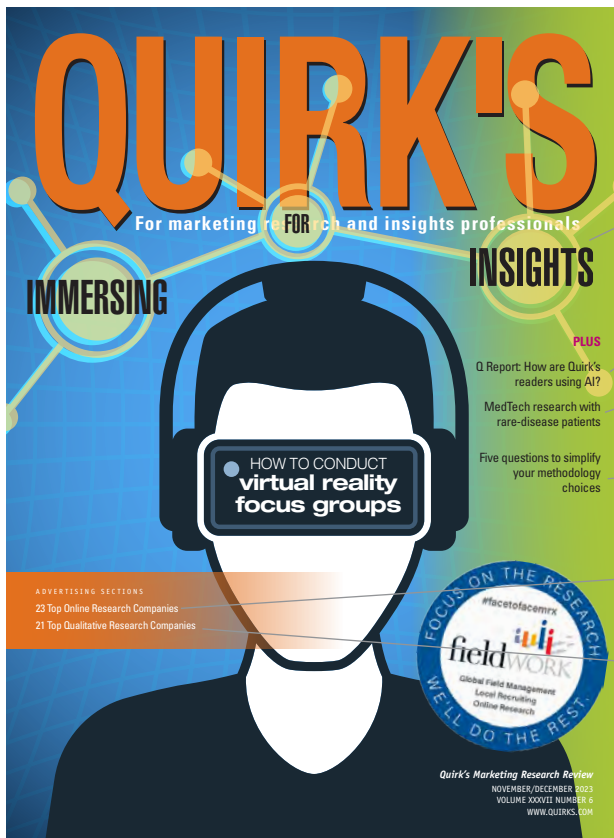Follow us on Instagram at www.instagram.com/quirksmedia.

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## Speak at the 2024 Quirk's Events!

Are you an end-client researcher who has a story to tell or a lesson to share? Consider speaking at a Quirk's Event in 2024! The event locations next year are Dallas (February 28-29), Chicago (March 26-27), London (May 8-9) and New York (July 17-18). Visit https://bit.ly/3rJZE02 to submit a session today!

**Dallas** February 28-29
**Chicago** March 26-27
**London** May 8-9
**New York** July 17-18

## // E-newsworthy

▌ **AI and marketing research: It's time to wake up**

▌ **Client-side researchers share communication pain points and strategies**

▌ **10 ways to improve your online surveys**

▌ **Transforming the customer service landscape: Marketing research and conversational AI**

▌ **6 key principles for effective segmentation studies**

*Scan to access all e-newsletter articles.*

## // Noted Posts

### Quirk's Blog

**Who is Gen Z? Transforming insights into actionable strategies**
https://bit.ly/3ZNvyMW

**Order bias: Don't let survey order corrupt your data**
https://bit.ly/3ROX0YZ

**Focus groups: What are they and tips to conduct them online**
https://bit.ly/3LWfNxL

### Research Industry Voices

**The advantages and disadvantages of custom recruitment**
https://bit.ly/3tsZz8X

**Brand loyalty: What is it and how to measure it**
https://bit.ly/3RTxstE

**How to bridge the qualitative and quantitative research gap**
https://bit.ly/3rQG75l

### Research Careers Blog

**How to encourage employees to share ideas at work**
https://bit.ly/3tqRL7D

**How to manage anxiety in the workplace**
https://bit.ly/3tt0mGX

**How active listening can help fight employee burnout**
https://bit.ly/3ZPsr7m

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**RM03 - Designing Effective Questionnaires:**
*A Step by Step Workshop*
VIRTUAL: $3,225
Feb 27-Mar 1   May 14-17

## RESEARCH APPLICATIONS

**RA01 - Applying Research & Insights:**
*Customer, Brand, Product*
VIRTUAL: $2,830
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**RA03 - Market Segmentation:** *Designing, Implementing, Activating*
VIRTUAL: $3,225
Mar 12-15

**RA04 - Fundamentals of Pricing Research:**
*Strategies & Analytical Techniques*
VIRTUAL: $2,830
June 25-26

## COMMUNICATION

**C01 - Writing & Presenting Marketing Research Reports:** *Insights, Storytelling, Data Visualization*
VIRTUAL: $3,225
Feb 6-9

## DATA ANALYSIS

**DA02 - Tools & Techniques of Data Analysis**
VIRTUAL: $3,225
May 7-10

## QUALITATIVE

**Q01 - Moderator Training:** *Focus Groups & IDIs*
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Feb 13-16

IN-PERSON (Cincinnati): $3,495
Apr 23-25

**Q02 - Specialized Moderator Skills for Qualitative Research Applications**
VIRTUAL: $3,340
Apr 9-12

**Q04 - Building Better Facilitation Skills:**
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••• renewable energy research

## Personal recommendations power solar panel uptake

When it comes to trying new products, the power of a friend's advice is well-documented. If that new product is solar panels, a Swiss study has found, an equally powerful influence can be your physical proximity to the friend.

The circulation of information within a community can be an important driver of the energy transition, the study's authors say, and that spatial proximity should be considered alongside social proximity. They suggest concrete measures that policymakers can take, such as sponsoring local information campaigns run by neighborhood associations, businesses operating in the energy transition and people who already own solar panels.

"Solar-panel owners enjoy talking about their experience – describing how much power the panels generate per year and how much money they save," says Glòria Serra-Coch, the study's lead author. "Our study shows that renewable energy should be promoted through trusted individuals who form part of a close circle – including a close circle geographically."

A survey conducted for the study of 1,125 people living in the Swiss canton of Vaud asked whether respondents have installed solar panels, whether they are homeowners or tenants, whether they know someone who has installed solar panels and, if so, where this person lives and if this person had suggested they buy solar panels too. The results showed that 17.6% of respondents owned solar panels and 40.4% of these individuals knew someone else who had them. The study found that factors such as gender and stated environmental viewpoints don't have a significant influence.
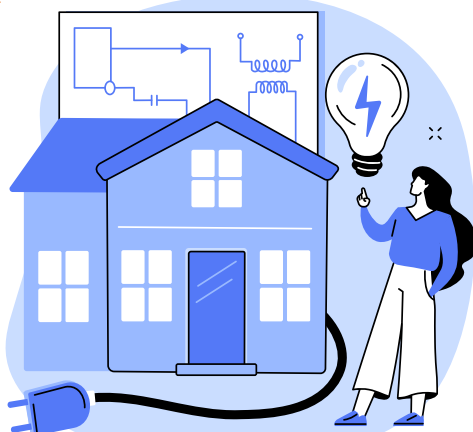
••• health care research

## Survey highlights member satisfaction Rx for health plans

A survey of more than 2,800 health plan participants conducted by health care SaaS company HealthEdge uncovered five things plans can deliver to improve member satisfaction: incentives and rewards for healthy behaviors; easy access to health records; access to providers who offer care based on member preferences and personal traits; good customer service; and tools or information to help members find less-costly care.

The survey also uncovered key differences among generational and line of business consumer segment responses. Dual-eligible plans, designed for people who qualify for both Medicare and Medicaid, appear to have the highest member satisfaction. Responses suggest 18-24-year-olds are four times more likely than other age groups to prefer communicating with health plans in digital ways, such as texting and mobile app messaging. "For this on-the-go, mobile-everything population, convenience isn't an option – it's a necessity," says Christine Davis, senior vice president of marketing at HealthEdge.

Responses from participants age 65 and up imply older members prefer outreach through more traditional channels, such as phone calls and e-mails.

# Every child should have equal opportunity and access to a quality education.

During the 2023 Backpack Challenge, the MR industry logged **129,000+ minutes** reading and donated nearly **$40,000 to promote children's literacy**. In partnership with the **Kids In Need Foundation (kinf.org)**, the **Marketing Research Education Foundation (MREF)** will help to send **1,500+ backpacks** full of essential school supplies to under-resourced kids.

BUILD A BACKPACK

## A SPECIAL THANK YOU TO OUR BACKPACK CHALLENGE SPONSORS:

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## OUR MISSION

To unify, inspire and activate the marketing research community to focus its collective resources to educate children and youth worldwide.

**MREF** — Marketing Research Education Foundation

**MRGivesBack.org**

# It's a busy fall for all



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Joe Rydholm can be reached at joe@quirks.com

The advent of fall has always meant the start of marketing research conference season to me. And of course it still is – ESOMAR, TMRE and Insights Association all stage autumn events – but since we entered the conference space back in 2015 with our first Quirk's Event, fall has also become the time when we kick off the planning for the next year's gatherings.

A big part of that process for me is client-side speaker recruitment, which I help coordinate along with cranking out the magazine, and as I did in this space last fall, I wanted to again extend an invitation to client-side readers to consider speaking at one of our 2024 Quirk's Events:

**Dallas:** February 28-29
**Chicago:** March 26-27
**London:** May 8-9
**New York City:** July 17-18

Sessions are 30 minutes. Our events don't have themes or subject tracks, so you could speak about anything and everything marketing research-related: project case studies; best practices; how you navigate internal politics; tips for communicating with the C-suite; why you still love focus groups – you name it!

You don't need to be doing work that's on the bleeding edge of innovation (though that's interesting too!). New tools and methods are constantly cycling in and out of our industry but the old standbys still get a lot of use (especially when they're budget-friendlier and known quantities for perennially cash-starved and overworked insights departments) and people are always interested in learning how to maximize their utility.

In general, I've long urged prospective speakers to think of their sessions as a kind of knowledge exchange, where they share their hard-won tips, tricks and strategies with an audience of their peers, with the goal of helping everyone involved find the insights their organizations need while raising their own internal profile and career prospects.

The best part: You'll receive free full-conference registration as a token of our thanks for speaking!

If you've never attended or spoken at a Quirk's Event, you can scroll to the bottom of the page at https://thequirksevent.com to see links to the 2023 Events and get a sense of what some of our past sessions have covered.

While it takes a ton of work to organize and stage four events each year, it is immensely satisfying and the level of support we have received from sponsors, exhibitors, speakers and attendees has been humbling. After nearly 40 years of serving the marketing research industry, with no membership fees or paywalls for our information, word continues to spread about what we do. In 2023 we had a record number of end-client attendees across our four events, which is especially rewarding because that means our target audience is finding value in attending.

I also wanted to make sure to mention our 2023 Marketing Research and Insight Excellence Awards, the ceremony for which will be broadcast on November 14 at 1 pm Eastern. If you are reading this in time, you can watch the live broadcast or swing back after the fact to https://www.quirksawards.com to catch it. We received over 200 nominations and had help from more than 45 marketing research industry judges in determining the winners. Client-side researchers and their vendor partners are doing so much valuable work and it's great to see them be recognized for it.

Last but not least I'll throw out another invitation to contact me if you are interested in writing for the magazine. While client-side researchers are our target audience, most of them understandably are not able to write about the work they do (or even marketing research in general!) so I've long had to rely on the vendor-side authors who get what we are trying to do with our content: provide interesting, objective thought-leader-type articles that, like our Quirk's Event sessions, run the gamut from examining the pros and cons of new tools like AI to writing better questionnaires.

No matter how you'd like to participate, reach out to me at joe@quirks.com and we will get you started! Ⓠ

••• advice for researchers

# ASK THE **EXPERT**

Expert answers to important research questions.

## How should we be thinking about experimenting with AI?

AI is dominating the conversation among insights teams these days. But before jumping into experimentation, we need to reframe how we think about AI. This emerging technology won't inherently unlock new understanding – the inputs we feed it will.

Rather than "artificial intelligence," think "all-inputs." AI is only as smart as the data we provide.

Remember the fizzle of big data? Behind the hype lay more flawed, mediocre inputs. More data ≠ better data. And this provides a cautionary tale beyond the hype of the AI hysteria.

Would you prompt ChatGPT to "write a market research report" and publish the generic output? Of course not. The quality reflects the inputs.

As Professor Richard Baldwin famously put it, "AI won't take your job, someone using AI will." AI is a tool to enhance our work, not replace it. Like digital in the 2000s, AI can help us work smarter – if we use it right. In a recent webinar, Insights Association CEO Melanie Courtright observed that

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Founder and President
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**ALPHA**-DIVER

the transition to AI closely resembles the transition to digital in the early 2000s. The words, promise, ideas and hysteria feel reminiscent of that period.

But, just as with digital, AI starts with the same old challenge: clearly defining the problem. And aligning stakeholders. And communicating sim-

ply. AI augments human intelligence by tackling tedious tasks, not by solving problems for us.

The victors will be those who focus first, not on the technology, but the inputs. Unique, insightful inputs – not the same vanilla data repackaged.

So before launching new AI experiments, scrutinize your inputs. Are they capturing true human behaviors and motivations? Or just weak proxies and assumptions? The quality of outputs depends on it.

AI's full potential emerges when combined with richer inputs from new data sources and advanced methodologies. Don't just dust off and digitize a bad survey. Use AI to mine the gems hidden in both structured and unstructured data.

The future belongs to those who feed AI something new. The same inputs will get the same outputs, no matter how slick the tech. Smarter AI starts with braver inputs.

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

# HARMONIZING
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## AND EXPERT OPINIONS

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**Tech-driven, cost-effective research saving time, delivering ai-driven insights, and valuing every voice.**

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## myCLEARopinion Panel

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Utilize the power of our expert industry sample for in-depth, accurate, and targeted market research. Leverage our extensive and diverse panel of industry experts to gather valuable insights that can guide your strategic decisions.

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### DATA CHECKING
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# INNOVATIVE
# PRODUCTS & SERVICES

**Q**

Technologies, methodologies and techniques are rapidly changing in the marketing research and insights industry. New products and services are being made and improved at an extremely fast pace. How can you keep up with what's new? Quirk's has you covered. Whether you're looking for new software, services or technologies, these companies offer the newest tools and innovations to help your research stay up to speed!

## Meet Glimpse: A global, generative AI-powered, self-service research platform

Ask any question. Find any audience. Use AI to uncover purchasing decisions, behavior, emotions, awareness and more.

### How clients are using our platform
- AI topics instantly codes open-ended responses as a human researcher might.
  - **Client example: Wells Fargo and NFCC** dove deeply into renters' experiences of housing insecurity to shape outreach.
- Gen AI outputs like "key messaging?" or "newsworthy topics" (and many more!) accelerate the path to insights.
  - **Client example: Hubspot** teams used Glimpse to get closer to marketers and then to shape strategy and B2B thought-leadership content.

Glimpse offers representative data, intelligent guardrails, fine-tuning and added context to enable clients to craft insights, tailor messaging and create nuanced personas with AI.

### Negotiate AI innovation challenges
These adoption challenges are based on gen AI outputs, from respondent data!
1. *"Garbage in, garbage out"*
   How can we generate high-quality data and then focus the application of generative AI on the business outcomes that matter most?

2. *Accelerating adoption*
   How can we adopt gen AI more widely, based on strategic planning and focused on value creation and customer understanding?

Innovation is about more than discovering the coolest technology; it's also about the difficult work of experimentation, adoption and risk-avoidance.

Reach out to Glimpse to take advantage of our hard-won expertise when it comes to applying generative AI to some of the world's toughest business challenges.

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For today's marketers, creators and researchers.

# Get insights on your products in real time

Getting honest and authentic feedback from consumers on your products is an essential component to making confident business decisions. Unfortunately, most of the time that's easier said than done. While in-home usage tests (IHUTs) are critical to successful product development, they can oftentimes be complex, expensive and prone to low data quality.

Sago's On-the-Go Product Testing makes complex product testing simple by using the QualMobile™ smartphone app to guide participants through a structured and guided research process. With On-the-Go Product Testing, you'll get engaged participants, enhanced activities and exceptional data quality – powered by a user-friendly app. QualMobile helps participants capture not just quantitative responses but also photos and videos as they interact with your product.

## On-the-Go Product Testing
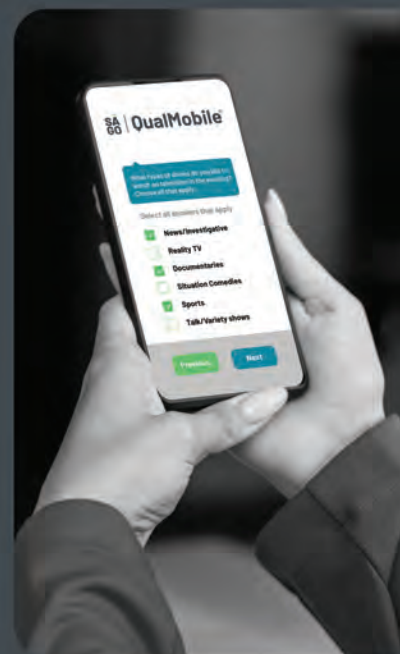
On-the-Go Product Testing combines the cutting-edge technology of the QualMobile platform with recruitment from Sago's global qualitative panels and full project management to make complex product testing a breeze. Sago experts recruit respondents based on your specific needs and eligibility criteria. They then ship products to selected participants with the help of the QualMobile app. Your chosen activity types, ranging from unboxing videos to daily usage check-ins, are then set up and participants receive reminders and notifications via the app when they are due.

When the project is complete, you can receive deliverables ranging from raw data exports to full-service analysis and reporting based on your needs.

## With On-the-Go Product Testing using QualMobile, you get:

- A user-friendly experience with a simple and effective smartphone app.
- A highly-engaged panel of participants that match your criteria.
- Accurate and authentic feedback in real-life situations.
- Exceptional data quality.

# SĀGO

- In-context capture of photos, videos and audio from participants.
- An expert team to help manage your project.

## When to use On-the-Go Product Testing:

- Package and label testing.
- Satiety measurement.
- Taste tests.
- Pet product research.
- Usage tests.
- Any time you need real-life, on-the-go feedback for your product or service.

At Sago, we know the importance of getting real-time feedback from your customers. That's why we've created On-the-Go Product Testing using QualMobile – a solution designed by qualitative researchers for qualitative researchers. If you need real-life feedback for your products, just Say Go.

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In a world where attention is currency, your marketing strategy needs to incorporate a powerful design audit tool.

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- **Analyze:** Feng-GUI simulates human vision and effectively predicts (92% MIT-verified) where users will focus their attention on your design. Our algorithmic model has been trained with millions of data points across tens of thousands of eye-tracking experiments.
- **Reports include:** Heatmap, gaze plot, focus, areas of interest, aesthetics, facial expressions, cognitive load vs. focus, approach vs. withdraw. Reports provide a complete graphic representation of the strengths and weaknesses of your design.
- **Insights:** Turn visual data into actionable insights. Refine layout, placement, format and key messages to induce action and increase conversion rates.

Stay ahead of the market by leveraging AI to boost productivity and reduce costs.

Feng-GUI AI-powered neuromarketing.

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Attention is Currency
Feng-GUI

## Informed Decision Group's life-sized virtual aisle

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

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

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

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

**Test and optimize:**
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- Signage.
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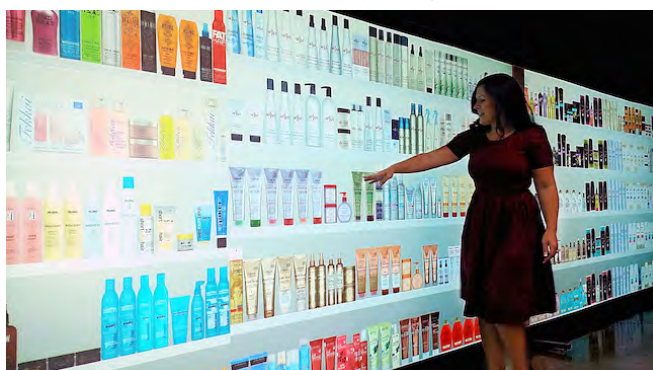




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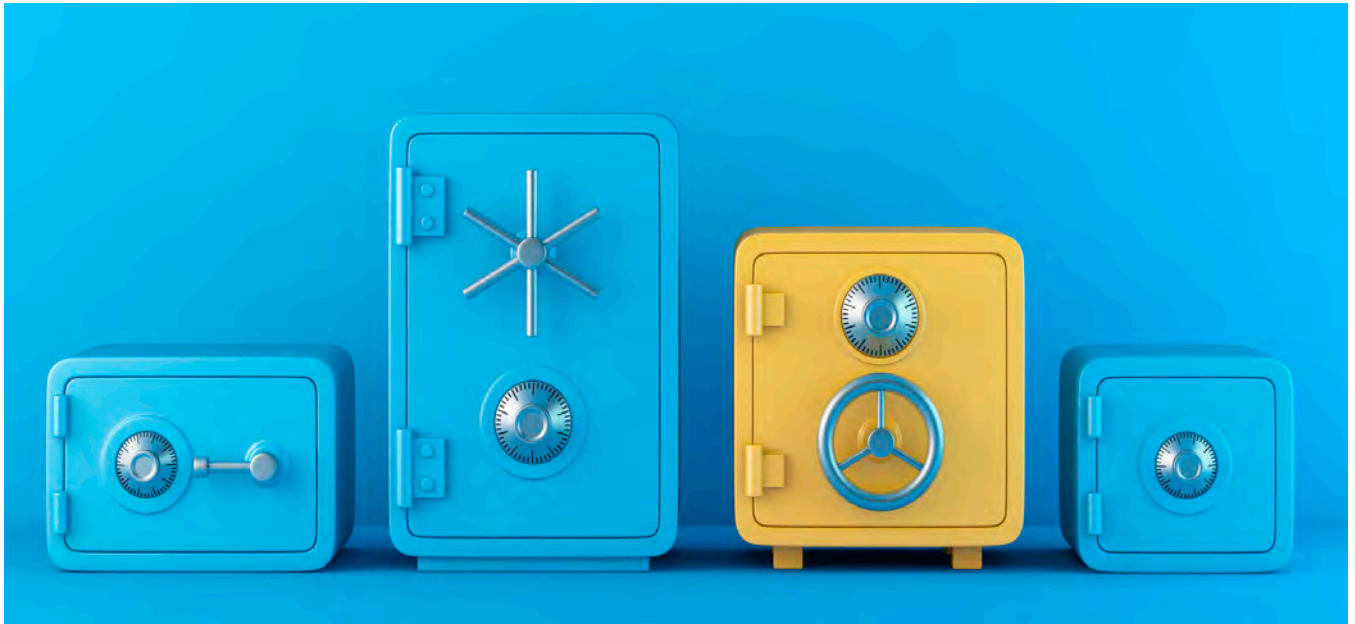
••• financial research

## Hopeful for a debt-free future

### Gen Z optimistic about financial security

Despite most Americans having modest expectations of what it means to attain financial freedom, just 11% report they are living their definition of it, according to a new survey by digital personal finance company Achieve.

Amid a challenging economic landscape including a potential recession, consumer credit card debt surpassing $1 trillion and the restart of student loan repayment on the horizon, it's understandable that many Americans are feeling financially defeated. The survey asked consumers to select the ideas of financial freedom that they most agreed with and found the most common definitions were living debt-free (54.2%); living comfortably but not necessarily being rich (50%); the ability to regularly meet all their financial

obligations and still have some money left over each month (49%); and never having to worry about money (46%). Far fewer respondents believe financial freedom means being rich (13%) or having enough money to give up working altogether (32%).

While attitudes about most topics can vary wildly across generations, when it comes to defining financial freedom, it's unanimous: living debt-free tops the list. More than half of consumers across each generation surveyed agreed that being debt-free is their No. 1 financial goal (52% of Gen Z, 56% of Millennials, 52% of Gen X, 55% of Baby Boomers). Baby Boomers (15%) are the generation most likely to be living their definition of financial freedom,

compared to Gen X (8%), Millennials (9%) and Gen Z (12%).

Over half of respondents (58%) indicated that they are not anywhere close to reaching their personal definition of financial freedom. At the forefront of this challenge is that many Americans lack a well-funded savings account, with 40% of respondents lacking a basic bank savings account. Among those that do have a savings account, 36% said they have less than $1,000 in it.

Whether these individuals believe they are close to reaching their definition of financial freedom or not, many are optimistic. More than half (52%) of respondents say their journey toward this ideal is getting better, compared to 37% who report it's getting worse.

Seventy-eight percent of consumers report having a checking account (65% of Gen Z, 76% of Millennials, 81% of Gen X and 86% of Baby Boomers), compared to 60% of consumers with a savings account (58% of Gen Z, 61% of Millen-

nials, 57% of Gen X and 62% of Baby Boomers). Surprisingly, more consumers reported having a cryptocurrency wallet (13%) than a professionally managed investment account (10%). Only 33% of respondents reported having an IRA/401(k) retirement account and just 41% of respondents said that they are very confident they will be financially secure once they retire.

Meanwhile, older generations were more likely to feel uncertain about their retirement prospects, with those closer to retirement saying they are not confident they will be financially secure when they retire (35% of Gen X and 34% of Baby Boomers). On the other hand, Gen Z, the generation furthest away from retirement, is the most optimistic with 51% saying they are very confident about being financially secure when they retire.

*The data and findings are based on an Achieve survey conducted in July 2023 with 1,000 U.S. consumers ages 18 and older and is representative of Census Bureau benchmarks of the U.S. population for age, gender, race and ethnicity.*

••• sports research

# Fanhood grows with us

## Sports fans want social experiences

Shifts in technology and consumer behavior are redefining the way fans enjoy sports, both at home and in person. Despite the rapidly evolving landscape, Deloitte found that fans are quite passionate and willing to invest their time and money into their fandom.

Nearly 90% of fans say their fanhood has grown (37%) or stayed relatively the same (52%) over the past three years. Almost 70% of respondents say they're sports fans because sports are entertaining. Participation in sports is also a common thread, with 68% of fans indicating that they currently participate in sports or have in the past. When asked to pick a single reason for the genesis of their fanhood, approximately a third of fans attribute it to their participation in youth sports.

Gen Z fans crave a social sports experience. Most of the time (61%) when watching live sporting events from home, Gen Z fans say they're watching with other people, compared with 53% of Generation X and 48% of Baby Boomer fans. This communal experience is a substantial draw for many – nearly 40% of Gen Z fans say they'd be more likely to watch an event from home if they were watching with friends or family. Gen Z fans are also tapping into technology to expand their communities and their sports fandom. Approximately half of Gen Z fans say they have used social media either to read comments and opinions from others or to interact with others while watching live events from home.

Fans want subscription video on demand (SVOD) features that enhance – but don't overshadow – the game. Thirty percent of all fans – and 46% of Millennials – have paid for a subscription to a streaming video service to watch sports over the past 12 months, the research finds. When asked about watching a sporting event on a specific SVOD service, about half of fans say the experience is more interactive and personalized than watching the same event on cable or broadcast TV. Fans also indicate that they want more features as part of their SVOD services to enhance their sports-watching experience. For all fans, whether they currently subscribe to a video streaming service or not, about a third would want real-time stats and analytics (35%) and different camera angles (34%) included as part of their SVOD service.

Fans are crafting their own perfect experience at home. On average, most sports fans (88%) surveyed watch live sporting events from home at least weekly.

Seventy-one percent say that live sporting events are their favorite type of sports content. However, this drops to 58% for Gen Z and Millennial fans. They have a more diverse set of favorites which include highlights and clips, documentaries and sports-related social media videos.

Fans use a television to watch live sporting events from home 74% of the time, on average. That percentage of time is 58% for Gen Z fans and 61% for Millennial fans. They are using their mobile devices, laptops and tablets the rest of the time. Many fans, especially younger ones, are multitasking while watching sports at home.

Bettors invest more in their fandom; non-bettors are more wary. Twenty-two percent of sports fans over age 21 say they've bet on a professional sporting event in the last 12 months. For Millennial and Gen Z sports fans, this increases to 30%. In general, sports bettors tend to be more active fans across the board. While at home, 58% of sports bettors say they have bet through a website or mobile app while they watched live sports. In venues, 23% of sports bettors say they use their mobile device to place sports bets while attending a live sporting event. Looking into the future, 66% of sports bettors say they want the capability to bet on different aspects of a game in real-time on their mobile device while they attend an event in person. Surveyed non-bettors report concerns however with 66% saying they are tired of seeing so much advertising around sports betting and 59% indicating they worry about the long-term impacts of sports betting on professional sports.

Virtual reality (VR) is still on the undercard. Sports and VR seem like the perfect pairing but the market is still niche for now. Only 5% of all sports fans surveyed say they have used VR to consume some type of sports content in the last 12 months. However, when given a list of six different sports-related VR experiences, roughly 70% of Gen Z and Millennial fans were interested in at least one of them. The top activities of interest for Gen Z and Millennials include playing sports-related VR games, watching live sporting events from an athlete's point of view, remotely attending a live sporting

event and co-watching an event with friends and family.

Fans prefer digital assets with real world benefits. Around 40% of Gen Z and Millennial sports fans say they are very or somewhat familiar with the use of non-fungible tokens (NFTs) and fan tokens in sports. However, it's still a niche market, with just about 5% of sports fans surveyed saying they have purchased or received a sports- or athlete-related NFT or received a team fan token in the last 12 months.

For those who are familiar with NFTs, what value do they see? There's currently no clear consensus, with 37% of fans seeing NFTs in sports as a fad, 32% as an investment and 24% as something fun to express fandom. What may help is a clear connection between digital assets and well-defined benefits for the fan. When given the definition of a fan token and asked how likely they would be to purchase a token if a specific benefit were offered, there was overall enthusiasm from fans.

*The Wall Street Journal recapped Deloitte's survey which polled approximately 3,000 U.S. sports fans.*



••• employee research
# Workers favor lunch-hour socialization

## Employees lean towards on-the-clock experiences

Companies may want to hold off on adding another after-work activity to the calendar. Corporate food solutions provider ezCater found that over two-thirds of workers (68%) said they would prefer socializing with cowork-

ers during their workday rather than off the clock.

Eighty-one percent of employees wish their workplace offered more bonding activities during work hours and the most desired time to socialize with coworkers was lunchtime (32%). With the return of the commute back in most employees' routines, after-hours work events can take a toll. When asked how attending a work event outside of regular hours impacts respondents, 31% said they were concerned about losing time they want to spend with family, friends or recharging alone.

Employees feel obligated, not excited, to attend workplace events outside of work hours. Organizations encouraging employee attendance at events outside of traditional work hours may be putting unwanted pressure on employees. Over half of workers (64%) have felt obligated to participate in work events outside the office that they didn't want to join and 51% of respondents have lied to skip an after-hour work event or snuck out altogether.

Lunch in the office is a morale boost. Overwhelmingly, free lunch and time to eat with coworkers was the activity employees wished their workplace offered the most during working hours (87%). Less than half of respondents opted for other activities during work, specifically: cooking and cocktail demonstrations (41%), workouts (39%), art projects (36%) and guest speaker series (33%). Employees believe that daily (46%) or weekly (35%) catered meals would motivate them to be productive during the summer compared to after-work events.

"Lunch-citement" is a trend in the office. Nearly all workers (94%) feel excited if they know their office provides catered lunch. In fact, employees get so excited that nearly all of them scope out the menu at least one day in advance (92%) when their workplace provides meals. Saving money (63%), the variety of food (61%) and how lunch gives workers a real break during their workday (59%) contribute to employees' feelings of excitement.

*This survey was fielded in March with 500 in-person and/or hybrid workers nationwide.*



••• employee research
# Back to (in-person) work

## Companies desperate for a return to office

COVID-19 changed workers' expectations about where they can do their work. A Conference Board survey found that getting workers to return to the office was the second most difficult objective for companies, exceeded only by finding qualified workers (80%). Seventy-three percent of organizations reported struggling to get workers to return to the workplace.

Most businesses are trying to increase on-site work. Sixty-eight percent are considering or implementing talent strategies to increase on-site work including team-building and celebratory events (62%), flexible days/hours (59%) and relaxed casual dress code (56%). Fifty-six percent of workers continue to work remotely at least part of the time, according to surveyed HR leaders, and 76% of professional and office workers work a hybrid or remote schedule.

Eighty-eight percent of organizations employing mostly manual services workers and 75% of organizations employing mostly office workers report difficulty finding qualified workers. Sixty-eight percent of organizations employing mostly manual services workers and 54% of those employing mostly office workers report difficulty retaining workers.

Organizations mandating on-site work have much greater difficulty retaining workers with 71% reporting retention struggles, compared to 46% that give workers a choice of where to work. Voluntary turnover among fully on-site

workers has increased 26% in the last six months, twice the rate of increase among fully remote workers at 13%.

Employee well-being including mental health and sense of belonging are suffering. Forty-three percent of surveyed HR leaders report decreased employee mental health compared to six months ago. Thirty-two percent report decreased sense of belonging/inclusion, 31% say they have lower levels of employee engagement and 30% saw a decrease in employee intent to stay.

Businesses are – or soon will be – cutting costs. Twenty-nine percent of respondents report that their organization had implemented layoffs in the last six months and 19% expect to implement layoffs in the next six months. Layoffs expected in the next six months are most prevalent in retail, wholesale, travel and entertainment, information services, publishing and telecommunications and manufacturing.

Employee well-being has declined more in organizations that recently implemented cost-cutting measures. Of those organizations, 46% saw a decline in employee mental health, compared to 36% who have not cut costs. Thirty-seven percent of organizations who have cut costs report a decline in employee sense of belonging, compared to 26% of those who have not and 36% of organizations who have cut costs report a decline in employees' intent to stay, compared to 22% of those who have not.

*The Conference Board conducted this survey with 185 U.S. human resource executives from April 25 to May 14, 2023.*



● ● ● environmental research

## Flying the eco-friendly skies

Sustainable travel practices increasingly valued

According to finance technologies provider Emburse, 38% of businesses reported an increased investment in sustainability, with 71% having a formal policy or guidelines set in place. However, only 37% of these businesses actively enforce these policies during bookings and travel expense approvals.

Only one in six employees cited sustainability as their key priority when making travel plans, significantly below both cost and traveler convenience. While environmental concerns remain a low priority during the booking process for business travelers, 71% said their employer should do more to enable sustainable travel. Meanwhile, the majority (76%) of employees also agreed they would take a more sustainable mode of transportation if financial incentives or sustainability programs were available.

Seventy-one percent of businesses currently provide guidance for sustainable travel, of which, 38% have a formal policy and 33% have a set of guidelines in place. Beyond hybrid working structures, only 37% actively enforce policies to encourage sustainability for both the commute and business travel. Forty-three percent are considering implementing initiatives and incentives like travel budget incentives, cycle-to-work schemes and remote training to encourage sustainable employee travel. Twenty-five percent of businesses do not have a business travel sustainability policy and 6% do not plan to implement one.

Thirty-eight percent of businesses have increased their investment in sustainability and over a quarter (27%) have reduced sustainability investments due to the higher cost of doing business. When booking business travel, 31% prioritize cost-effectiveness, followed by convenience and accessibility (27%), loyalty and rewards programs (21%) and sustainability (16%). Only 26% would proactively cut down on travel to reduce their carbon footprint.

Seventy-one percent of employees want their employer to do more to enable sustainable travel. Only a small minority (7%) of employees do not want employers to do more to enable sustainable travel and 76% of employees would choose a more sustainable mode of transportation if their employer provided programs or financial incentives. Employee demand for incentivized sustainable travel has increased by 19% since 2021. Seventy-four percent of employees believe it is their organization's responsibility to do more to enable sustainable business travel, regardless of cost.

*This survey was conducted by Censuswide on behalf of Emburse with 1,257 U.K. respondents, made up of 1,003 British employees and 254 employers from May 17-22, 2022.*

●●● special advertising section

# 21 TOP QUALITATIVE RESEARCH COMPANIES

While both qualitative and quantitative research are crucial in the marketing research and insights industry, if you need in-depth, targeted insights from consumers, qualitative research may be the way to go. Companies specializing in qualitative research can offer a broad range of services and solutions including in-person and online focus groups, interviews, recruitment databases and more.

If you need customer insight for your product or service, need help developing strategies to grow your business or are looking for digital or traditional qualitative research solutions, these companies have access to the necessary channels to reach relevant audiences for in-depth feedback. Regardless of the field of research you specialize in, these qualitative marketing research experts can offer different but effective ways to gather the valuable insights you need for your next marketing research project.

## Decision Point Marketing and Research

Founded 1994 | 6-8 employees
Amy E. Boren, President

Decision Point Marketing and Research specializes in digital qualitative research using artificial intelligence, social media and a nationally curated database of 40K consumer, "real person" and B2B respondents. Accomplished and results-driven Amy Boren, president, is a marketing research leader committed to maximizing project efficacy by utilizing creative methodologies to secure cooperation in our studies. DPC competency also spans into the qualitative realm of research where we conduct interviews, focus groups and observations to understand patterns within the circumstances expressed in the field. Contact us today to learn how consumer research can be stealthy, efficient and organic, which provides what you need to make strategic decisions!

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## EthOS

Founded 2009
Paul Chesterman, Partner

EthOS is an innovative qualitative research platform that's revolutionizing the way companies understand customers and their experiences. We empower research teams with advanced tools to capture omnichannel touchpoints, providing real-time insights into ever-changing needs, attitudes and behaviors. Immerse yourself in the lives of your customers through in-the-moment videos, pictures and screen recordings, then leverage AI to unearth rich, real-world insights. You have the flexibility to recruit from your own networks or our extensive participant pool, ensuring you pinpoint your exact target audience. Boost your customer empathy and qualitative research efficiency with EthOS.

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## Evolving Insights

Founded 2020 | 10 employees
Jessica Dogali, Founder and CEO



Evolving Insights, located in northern N.J., specializes in nationwide qualitative and quantitative research, both in-person and online, project management, screener design and project moderation. Our seasoned recruiting team excels in focus group recruitment, product testing, shop-alongs, ethnographies and more. Seamlessly tailored to your needs, our services are your compass to informed decision and market dominance. With a knack for finding the perfect participants and a strong commitment to your success, we deliver actionable insights that fuel growth. Choose Evolving Insights to elevate your market understanding and unlock invaluable consumer insights.

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## Fieldwork

Founded 1980 | 400 employees
Steve Raebel, President



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## Fuel Cycle

Founded 2007 | 125 employees
Eran Gilad, CEO

Fuel Cycle unleashes the power of decision intelligence for legendary brands. We achieve this by enabling brands to rapidly capture and act on the mission-critical insights required to launch new products, acquire customers and gain market share. Our technology enables decision-makers to maintain constant connections with their customers, prospects and users to uncover real-world actionable intelligence and insights. By integrating human insight with critical business data, and through automated quantitative and qualitative research solutions, the Fuel Cycle Research Engine powers product innovation, brand evolution and enhanced user experience.

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**www.fuelcycle.com**



## Global Survey

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

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Founded 1994
Bruce Tincknell, Managing Director



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## Key Lime Interactive

Founded 2009
Eugenio Santiago, President

Key Lime Interactive (KLI) is a customer experience (CX) and user experience (UX) strategy and research services agency focused on helping companies take a human-first approach to building better brand experiences, products and services. Key Lime's UX experts provide actionable insights for every industry sector to help their growing list of Fortune 100 clients understand and effectively engage their customers. Ultimately, KLI empowers teams to use consumer insights and user experience data at all phases of product development, from strategy to implementation. The company's experts share the true perspective of a client's target users to help them design exceptional consumer-driven solutions. Research studies are delivered with KLI's proprietary Inclusivity Index™ report, which makes it easy to identify how studies meet broad inclusivity goals to build a more inclusive brand, product or service.

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## L&E Research

Founded 1984 | 250 employees
Brett Watkins, CEO



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Founded 2000 | 600 employees
Mohit Gour, President, Market Xcel, USA

Elevate your research with Market Xcel! Market Xcel has pioneered excellence in market research, insights and technology empowering 700 customers for over 22 years. Our in-house global qualitative research experts and cutting-edge tools and methodologies ensure top-tier global research, be it online or in-person. From in-person focus groups to in-depth interviews, digital diaries, CLT and IHUT, we cover it all. Our diverse respondent pool spans consumers, HCPS, patients, caregivers and various B2B audiences, guaranteeing comprehensive insights. Choose from our tailored services: custom recruitment, translations to native languages, in-country moderation, simultaneous translations for non-English markets and English transcripts or reports. If you are on the lookout for a trusted global research partner, contact us at info-us@market-xcel.com.

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## Murray Hill National

Founded 2013 | 35 employees
Susan Owens, COO



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## Sympler

Founded 2019 | 8 employees
Ben Jenkins and Alexander Kane, Co-Founders



Sympler puts powerful human understanding back within reach of brand and marketing professionals, enabling strategists, brand managers and insights teams to excavate unlikely emotional truths without traditional qual's high costs and timelines. Unlike other methods that flatten emotion, Sympler's conversational system cajoles the many-sided human to show up, tapping their subconscious fears and desires with play, projection and reflection. We can do this because we chat in the private, intimate spaces of chat messaging. As the chosen insights engine for many of the world's top brands and agencies like NBC, Mars, Wieden+Kennedy, Anomaly, Grey, VCCP, Chemistry and TBWA, our clients benefit from smart ethnographic understanding (carried out by trained strategists), driving fundamental business decisions from the launch of a new product, brand or creative solution to brand value and social awareness.

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**www.sympler.co**



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Founded 2009 | <100 employees
Piyush Khurana, Director

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# MONTH OF SERVICE

During the month of January 2024, the **Marketing Research Education Foundation (MREF)** is encouraging researchers around the world to volunteer in their own back yards. Grab your family, colleagues or connect with your fellow researchers and do some good in your community!

## Need to know:

- **Volunteering at a local level** is a good way to truly connect with our communities.

- **Serve at your favorite nonprofit.** Or, the MREF can connect you with an organization.

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**OUR MISSION** | To unify, inspire and activate the marketing research community to focus its collective resources to educate children and youth worldwide.

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# Additional input needed...

Can generative AI be more than just a glorified 'auto-complete'?

| By Joseph Rydholm (with some help from ChatGPT)

THE **Q** REPORT
CORPORATE **RESEARCHER** REPORT

Findings from the Q Report, an independent study, written for and developed with the help of client-side marketing research and insights professionals

### abstract

Q Report respondents offer their views on generative AI and its place (or lack thereof) in their marketing research toolbox

As part of our 2023 Q Report survey of Quirk's readers earlier this summer we asked an open-end on their current or planned use of generative AI in their work. ("Are you using or planning to use generative AI in the research process?") The yesses and nos (and all the variations thereof) were pretty equally split, with a slight edge to those saying they are using or planning to use it.

With this being early days (and, in the case of this survey, which was fielded in July, even earlier days), it's understandable that there are so many in wait-and-see mode. And, unlike any new method or tool in recent memory, major and unavoidable issues around privacy and data security loom over its use by companies and organizations, as many of our readers indicated in their responses.

In the spirit of things, I used ChatGPT to generate a report on the responses to the open-end. Here is an edited version of what it came up with (a bit bland but not bad!) along with some handpicked survey responses sprinkled in to add color.

### Survey response: Yes, using generative AI

A significant portion of respondents indicated that they are already using generative AI in their research processes. Some of the common applications include:

**Data analysis:** Generative AI is being used to analyze data, which can include tasks like summarizing findings, coding open-ended responses and identifying trends.

*It is built into our dashboard product and we always use it for on-the-fly analysis.*

**Content generation:** Respondents are leveraging generative AI to help create content for reports, blogs, newsletters and questionnaires.

# TWO EXTREMES

A sampling of a few of the more definitive takes on the question about AI usage:

## PRO

*Here is how we are using it. Research design: find and summarize background information, define target audiences, identify market gaps, explain complex concepts and topics, connect different ideas, journal review, tutorials and knowledge test, challenge conventional wisdom, brainstorm new approaches, empathy ("describe how a patient would feel about …"). Questionnaire design: generate response list, bias check, question authoring. Data process: link to our data file (Google Drive – had issues linking it to our OneDrive), code simple OE data (color), paraphrase and classify text, generate SPSS syntax or Excel VBA, create data analysis outline/suggestions. Project communication/reporting: fix grammar, lengthen or shorten, critique writing and give feedback on how to improve, continue writing on an idea, write in the style of, create reporting outline to "tell a story," chart/visual suggestions.*

## CON

*I don't see this as valuable for us at all. If anything, it's a hazard for better bot responses. I don't understand what the purpose of Chat GPT would be in research, as we are crafting questions around very specific goals. In my experience, it's just a more user-friendly form of search. The results I get are general common knowledge. Nothing mind-blowing.*

*Absolutely not if I can help it.*

*Not yet but it will be forced upon us.*

*Yes. We are researching how to leverage AI tools so we can fire people and boost profits.*

**Idea generation:** Generative AI serves as a valuable tool for brainstorming and idea generation, helping researchers come up with innovative concepts.

*Yes, we explore broad topics/genres/audience interests this way. More in a brainstorming approach as well as analyzing open-ends.*

**Survey development:** It is used to assist in the development of surveys, including generating question options and response lists.

*I use it as a "thought partner" when writing questionnaires. For example, I might use it to help me define a technical term I want to use in more consumer-friendly language or give me an exhaustive list of answer options to closed-ended questions.*

**Text analytics:** Generative AI aids in text analytics, making it easier to extract insights from large volumes of unstructured text data.

*ChatGPT helped me come up with a calculation to prove the impact a survey I implemented was having on a corporate goal. We have experimented with it doing some basic text analytics, focus group write-up summaries, questionnaire-writing assistance, etc., as well.*

**Report writing:** Some respondents use generative AI to automate or assist in report writing, helping to create summaries and narratives.

*We will initially be using it to 1) generate or improve questionnaires and 2) identify fraud. Then we hope to use it to 3) create reports from survey data.*

## Survey response: Yes, planning to use generative AI

Another substantial group of respondents expressed their intention to incorporate generative AI into their research processes in the future. While the exact plans varied, common themes included:

**Efficiency improvement:** Many organizations see the potential for genera-

tive AI to improve research efficiency by automating time-consuming tasks.

**Idea generation:** Similar to current users, those planning to use generative AI aim to harness its idea-generation capabilities for research and content creation.

**Secondary research:** It is considered a valuable tool for secondary research tasks, including literature reviews and background research.

*We are testing ways of using it. For now it is being used most effectively in improving desk research and in helping to build response option lists for surveys. We will test it for open-end and interview transcript theme identification and summarization as well.*

**Coding and analysis:** Respondents foresee the use of generative AI in coding and analyzing qualitative data.

**Questionnaire development:** It is expected to play a role in questionnaire development, making the process faster and more efficient.

*Have looked into platforms that use AI to speed up and simplify the analysis of open-ended survey responses and feedback from qualitative interviews. Following this year's Quirk's event in London, I am also planning to try out ChatGPT more to develop questionnaires and discussion guides.*

**Content summarization:** Planned usage includes using generative AI to summarize research findings and insights.

## Survey response: Mixed intentions

Some respondents provided mixed or uncertain responses, suggesting that they are in the early stages of exploring generative AI's potential but have not yet formulated concrete plans for its integration into their research processes.

*Testing for summarizing of open text. Early tests to generate concept stimulus*

*had very poor results so unlikely to use for that any time soon.*

*Currently have an innovations task force researching this.*

*We're having fun – but it's not integrated into our workstream.*

*We've tried it a bit and will continue but we don't produce crap so it has to be stellar.*

*I think we're going to be late adopters on generative AI. For literature reviews, it's still useless. (Too many hallucinated articles.) Within the restrictions of a single dataset, I can see it being useful to flush out any additional themes from a series of transcripts or help create more sophisticated visualizations of relationships between codes. But for right now, it's a glorified auto-complete.*

*Possibly – we have a huge AI governance process that none of us really feel like dealing with, so it would have to be an amazing benefit to go through the pain. We are going through this now in order to use (legacy) Clarabridge.*

### Survey response: Not currently using generative AI

A smaller group of respondents indicated that they are not currently using generative AI in their research processes. Some cited concerns about privacy, data security and the need for more information before adopting these technologies.

*Where possible and legal but haven't done so yet. Waiting on guidance from the company on how to leverage AI.*

*Would love to but have to wait for our IT security team to give us the go-ahead. Don't think it will happen any time soon.*

*Beginning to use. Experimenting with a ring-fenced version of ChatGPT to maintain proprietary information.*

*I am the only research person and have product/brand management responsibilities too, so no time to carve out to learn about this.*

*No – company won't allow it on work computers.*

### Making inroads

Generative AI, exemplified by ChatGPT, is making inroads into the research process across various industries. Current users find value in its ability to automate tasks, generate ideas and assist in data analysis. Those planning to adopt it in the future see opportunities to enhance research efficiency, particularly in areas like coding, content generation and secondary research.

However, there remain concerns about privacy, security and the need for careful implementation. As generative AI continues to evolve, organizations will need to weigh the potential benefits against these considerations and tailor their adoption strategies to suit their specific research needs and objectives. The landscape of generative AI in research is changing rapidly and it will be intriguing to observe how these technologies shape the future of research methodologies and practices. Ⓠ

## 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.)

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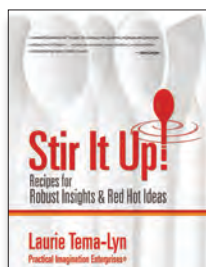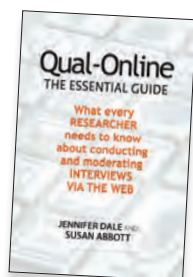
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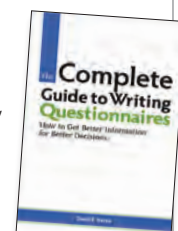
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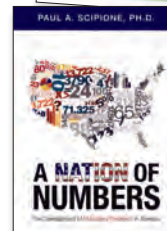
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HOW TO CONDUCT
**virtual reality**
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Virtual reality's ability to create immersive environments and maintain user engagement has great potential for marketing research, particularly in focus groups, by enhancing attention and involvement in research tasks. As VR technology evolves, it opens up new horizons, enabling researchers to explore multisensory experiences and expand the possibilities for collecting data in innovative ways.

By Seth Ketron

t is tough to look anywhere nowadays without seeing something about virtual reality (VR). Whether gaming, training, shopping, concert-going or something else, VR offers a wide range of potential for user experiences in a novel and rapidly developing medium. Marketers, of course, have taken notice. In fact, retailers and brands such as Levi's, Swarovski, Sephora, BMW and Toms have actively incorporated VR into the customer experience.

At one end, VR can be as extensive as virtual stores in which shoppers in VR can browse offerings, select products and make purchases – all within the virtual environment (v-commerce). At the other end, VR can feature one aspect of the broader customer journey, such as transporting customers to places of production for brand storytelling purposes or allowing virtual test drives of automobiles. As the technology evolves, the possibilities for marketing are seemingly endless.

With that said, VR carries many possibilities for marketing research! Before we discuss ways in which VR can be used to conduct studies (we will center on focus groups, though VR has other applications), let's discuss what VR actually is and how it works.

### WHAT IS VIRTUAL REALITY?

VR is a computing technology that immerses people into virtual environments (Berg and Vance, 2016; Cowan et al., 2023; Guttentag, 2010). These environments are often described in conjunction with the metaverse, thought to be a universal "reality" in the virtual domain in which users are fully immersed and can experience aspects of life not possible in the real world. Users may assume virtual identities in these environments via avatars (virtual likenesses) and potentially extend their lifestyles beyond what they do or have in real life, which opens possibilities for many industries in a wide variety of ways.

VR currently takes several forms that range in complexity, mobility and capabilities. A common, more immersive type, the automated virtual environment (AVE), sees users taking a first-person perspective within an interactive space. In some cases, AVEs are stationary, such as the CAVE (computer automated virtual environment), which makes use of special projectors in a physical room. These kinds of AVEs are often utilized in pop-up installations to specially feature brands, products or experiences.

More commonly, users can access AVEs via head-mounted displays (HMDs), like the Oculus Quest or HTV Vive, and access not only games (which have been a driving force behind VR development) but also virtual stores, training programs/modules, fitness and health care applications, real estate tours and tourist destinations. To a lesser extent, 360-degree video offers the ability to view environments in a more dynamic fashion than is allowed by two-dimensional images. It does not require specialized equipment, though products like Google Cardboard allow users to create a sort of VR headset in which they use their smartphones to look around a 360-degree environment while minimizing outside distractions or stimuli.

What makes VR different from other technologies, like conventional computer programs or smartphone apps? An important feature of VR is its ability to remove a user from the real world and shut out external stimuli. Immersion, or the physical and mental engagement of users with a virtual environment such that the environment feels close, is fundamental to VR – users experiencing immersion to a high degree are likely to be processing what they are seeing, hearing, feeling and doing to a greater extent. Compelling immersive environments may be capable of triggering presence, or the feeling that the virtual environment is actually real. Presence keeps users connected at a deeper level to the experience. When a VR experience is highly immersive, users are likely to enter flow, a state of heightened engagement and awareness in which the user feels "plugged in completely." Flow occurs when challenge and skill are optimally balanced. Those in flow states tend to

*When a VR experience is highly immersive, users are likely to enter flow, a state of heightened engagement and awareness in which the user feels "plugged in completely."*

lose track of time and filter out outside distractions, a process which immersive virtual environments facilitate. While flow has often been observed in contexts such as gaming and work, flow is possible in marketing-relevant contexts, especially those involving VR (e.g., Cowan et al., forthcoming).

Why does all this matter for marketing research? Well, one of the key challenges of many research designs is the ability to keep users focused and engaged. We often blame the human attention span as being hopelessly short and fragmented, but in fact, humans

*We may recognize the potential for VR to capture and maintain not only attention but interest and engagement with the task at hand. For marketing researchers, this is vital – we can get participants to stay with us longer.*

can pay attention when they want to. Consider the nature of binge-watching, in which people consume many hours of content in one sitting, and concerts, in which fans often spend hours enjoying live performances (with varying levels of mild discomfort in some venues!). Those scenarios are, of course, difficult for many brands and organizations to produce in everyday contexts (when is the last time we got really excited about the cleaning power of dishwashing detergent?), but as researchers, we are hoping to harness human attention and engagement long enough to get reasonably real and reliable data.

If we go back to the fact that VR is more immersive overall than other kinds of platforms, we may then recognize the potential for VR to capture and maintain not only attention but interest and engagement with the task at hand. For marketing researchers, this is vital – we can get participants to stay with us longer. Of course, there are other benefits to VR, which are discussed in greater detail below.

## VIRTUAL REALITY AND THE FOCUS GROUP

That tried-and-true method, the focus group, continues to be the backbone of marketing research, and for good reasons. Focus groups allow us to talk to a reasonably sizeable number of participants in a manageable time frame. They enable synergies among participants' responses and can be done practically anywhere. They allow us to gauge reactions to product prototypes, advertisements, logo and packaging designs – things that other common methods (like surveys) either prohibit or, at best, convert into pale facsimiles of the originals. (Can we truly and compellingly evaluate the way a new product looks or feels with a picture in an online survey?)

Unfortunately, focus groups do have their drawbacks. Loud, vocal individuals can sway or silence other participants (especially when moderators are not strong and skilled at balancing voices). Participants have to travel to a specified location, which is often a specially designed conference room or facility with contrived environments. This naturally prevents the geographically restricted, the unable to travel and the otherwise occupied (i.e., jobs, dependent care) from participating.

Recently, online focus groups have helped to alleviate some of these issues. With an online focus group, participants can be anywhere with a stable internet connection. Focus groups can also record written chat as well as vocal input and moderators can more easily manage group interaction. Conversely, online focus groups also tend to offer a less fruitful venue for observing nonverbal cues like body language and may not have the kind

of robust interactions that face-to-face focus groups have.

Wouldn't it be great if there were some way to blend the benefits of conventional and online focus groups? Actually, there already is – the VR focus group! VR not only offers abilities of both offline and online focus groups but also expands the possibilities for focus group research beyond offline or online alone. Consider the following example. Participants in a focus group come into a room and put on VR headsets. They then see themselves as avatars within a completely virtual environment. They can move their virtual hands via controllers they hold in their actual hands, "walk around" the room (either by physically walking or using controller joysticks), "sit down" (again, either by parking themselves on chairs in real life or navigating to a seated position in the virtual space). Users can also see each other, allowing for interaction and observation of each other's movements. The focus group proceeds as usual. The moderator welcomes participants, briefly discusses the agenda and then transports users to a completely different environment – perhaps a new restaurant concept, perhaps a production facility across the world or perhaps a fantastical planet in a different galaxy. Even better, the moderator can take the group to all of these locations (and more) if desired!

The use of avatars in virtual environments is an important feature, especially if the point of the group is to discuss topics that are sensitive or potentially embarrassing. In real life, even if focus group participants are strangers to one another, fear of negative evaluation tends to hamper our ability to be completely honest if we are concerned that said honesty will cause others to judge us. In a way, avatars are like masks for the body: we can make them look like ourselves; certainly, but more importantly, we can make them look like whatever we want them to be. In games and virtual social worlds, this means we can live out fantasies of who we have always wanted to be (a glittery pop singer on a big stage in front of screaming fans, maybe?). In more practical applications – a VR focus group, for example – avatars help to promote

anonymity, just like the use of pseudonyms. Thus, VR focus groups can be helpful for topics and aims that might call for more obscurity of identification among participants.

Let's consider a few illustrations of how VR can be used with focus groups (and other methods!).

First, new products are often a key element of focus groups. Prototypes at various stages may feature prominently in focus group sessions. VR can allow moderators to display virtual prototypes in a three-dimensional format. In simpler environments, moderators may place virtual prototypes on a table or pass them around. In more complex environments, they may be able to "conjure" prototypes for viewing.

Second, one of the most beneficial aspects of VR relative to conventional formats of focus groups is the ability to place users within simulated environments. This is a primary advantage of VR focus groups over conventional focus groups as moderators can test elements of the marketing mix that are not feasible or efficiently tested in the real world – a limitation especially applicable to environmental factors. Rather than having to build a series of expensive and expansive prototype stores, restaurants and so forth, VR allows researchers to construct virtual spaces at a fraction of the cost and users can walk around these virtual spaces as if they were real. Moderators can easily switch from one prototype space to another, eliminating the need for time-consuming physical travel.

Third, as mentioned above, beyond creating a lifelike environment, VR also naturally creates greater task involvement. This means that if you want focus group participants to complete certain more involving tasks, VR can help to facilitate that greater level of involvement.

## LIMITATIONS OF THE VIRTUAL REALITY FOCUS GROUP

VR focus groups do have their limitations, like other kinds of focus groups. For example, if you are running a VR focus group in a conventional facility (e.g., a conference room), the issue of sampling remains. You will still need to source participants who can travel to the designated location. If you are running a VR focus group with remote access, the key challenge is the sampling frame – you can only recruit people who have a headset, which is currently limited to a few million households of consumers who are more likely to adopt new technologies. However, as VR continues to evolve and adoption grows, the number of potential participants will increase. Further, even if the frame is limited, you are still able to get participants from across the globe in one virtual room.

A unique challenge in VR is VR sickness, a special type of motion sickness in which a user's brain and body are out of sync. Much like regular motion sickness, the things the user is seeing and experiencing in the virtual environment do not always match actual physical sensations, which confuses the brain and creates a dizzy, uncom-

*Rather than having to build a series of expensive and expansive prototype stores, restaurants and so forth, VR allows researchers to construct virtual spaces at a fraction of the cost and users can walk around these virtual spaces as if they were real.*

fortable (and sometimes persistent) feeling. Consider, for example, a VR experience in which someone is climbing a mountain. The mountain might look highly realistic but if the user bumps into a boulder, the brain expects the body to feel the sudden whack into rock – which doesn't happen with current technology – and the result is a headache. Fortunately, with thoughtful design and careful planning as well as further developments in the technology, potential VR sickness triggers can be minimized. For example, research has found that women tend to be more susceptible to VR sickness due to headset design (HMDs were originally designed using mostly men's heads; misalignment with fields of vision tend to cause VR sickness). Adjustable eyepieces in more recent headsets have been able to account for this issue to some extent.

## RUNNING A VIRTUAL REALITY FOCUS GROUP

If you intend to run a VR focus group, you will, of course, need the requisite equipment and resources, which include (but may not necessarily be limited to) the following:

**VR EQUIPMENT.** HMDs are the most common equipment type you might need. There are several options, from the more basic and budget-oriented to the more technically advanced. If you want to realize the full potential of VR for focus groups – say, customizing environments and tailoring features to your specific needs – you will need the fancier variety. If you only need a projected room, a CAVE might be more suited to your needs.

**A LARGE, EMPTY LOCATION.** Physical facilities are still needed if focus groups are to be conducted in person. Since movements should be less restrictive with virtual environments, your location may simply be a large empty room (rather than a smaller room with furniture, which would present tripping hazards). Virtual experiences often work best when users have a good three-to-five-foot radius around them, though that range should be tailored for the given experience.

**CASTING EQUIPMENT.** In conventional focus groups, it is common for clients and other observers to watch via one-way mirrors and/or recordings. With VR headsets, users can cast their views to external screens and record interactions in real time. Thus, for clients who wish to observe, VR headsets can cast in real time to television screens, computers and/or mobile devices. Casts

can also be recorded for viewing after the fact. While this is similar to simple video recording, an important feature of casting is that you can see experiences and recordings from each participant's viewpoint. This offers the ability to view not only the entire focus group asynchronously but also the unique perspectives of participants.

**A TRAINED MODERATOR.** While the tried-and-true skills of a moderator still apply in VR, the moderator should also be fully familiar with the workings of VR. This ensures that the valuable time of the focus group is not wasted on fumbling through unfamiliar features or trying to get certain tools in VR to work. The good news is that many VR headsets are user-friendly, so even a moderator who has never before seen VR can get up to speed relatively quickly!

*Remember the holodecks of Star Trek? Eventually, the technology could evolve into a "holodeck" of sorts, where environments become more realistic and less reliant on bulky tools and attachments.*

### FUTURE AND ADDITIONAL POSSIBILITIES

One of the ongoing challenges with VR is its inability to (currently) replicate a fully multisensory environment. While sights and sounds are easily accomplished in VR, viable and reliable technologies for other senses have yet to be developed on a mass scale. Smell is perhaps the most advanced of the remaining three major senses, with some development toward capabilities for real scents. For example, the Feelreal mask attaches to many VR headsets and utilizes cartridges to infuse smells that a user is supposedly encountering in the virtual environment. Smells don't have to be piped in with complicated equipment, though, especially if you are using VR headsets in an in-person focus group. For example, you can use candles, diffusers, sprays and other basic means of introducing scents into VR among a group. (Cowan et al., forthcoming)

Touch is currently quite limited – typical VR headsets with controllers allow for vibrations, much like gaming controllers, but do not convey finer tactile sensations like the textures of fabrics or furniture. Some advances in this domain have recently emerged, such as haptic gloves that simulate more realistic sensations of pressure. However, technology is still quite a way off from a broader range of realistic touch sensation.

Of course, taste is perhaps the most difficult to envision in a virtual environment. While we might be able to pipe in smells of food and potentially even replicate haptic sensations related to the process (e.g., chewing), we simply cannot create food out of simulated projections. However, as we know, the environment plays an influential role in our perceptual processes and food-related decisions are as much about where we eat as they are about what we eat. Thus, while food research may not be able to showcase virtual foods for gustatory tests, researchers can make use of virtual environments to determine how aspects of the environment can affect perceptions of and preferences for foods.

Remember the holodecks of Star Trek? Eventually, the technology could evolve into a "holodeck" of sorts, where environments become more realistic and less reliant on bulky tools and attachments. Of course, that is likely a long way off, but such a platform would maximize immersion, presence and flow.

Finally, VR can be used for other kinds of research beyond the focus group. To start, participants can complete surveys with more realistic stimuli. You might want to see how potential customers feel about 20 different designs of a new product, for

example. You could create a virtual environment in which those 20 designs are presented like an art gallery and participants can rate liking of each design by "walking" up to it and selecting a button on a virtual panel. Experiments are also possible. Taking our prior example, participants can be randomly assigned to a condition in which they view just one design and respond to a series of questions about it. As with focus groups, experimental stimuli may look much more realistic and permit interaction in VR vs. more conventional static stimuli.

### EXCITING AND POWERFUL TOOL

No matter if you're ready to take the plunge with VR or are still considering whether and how to use it for research purposes, hopefully this article has given you some ideas for how to use this exciting and powerful new tool – both for marketing research and for the world! 🅞

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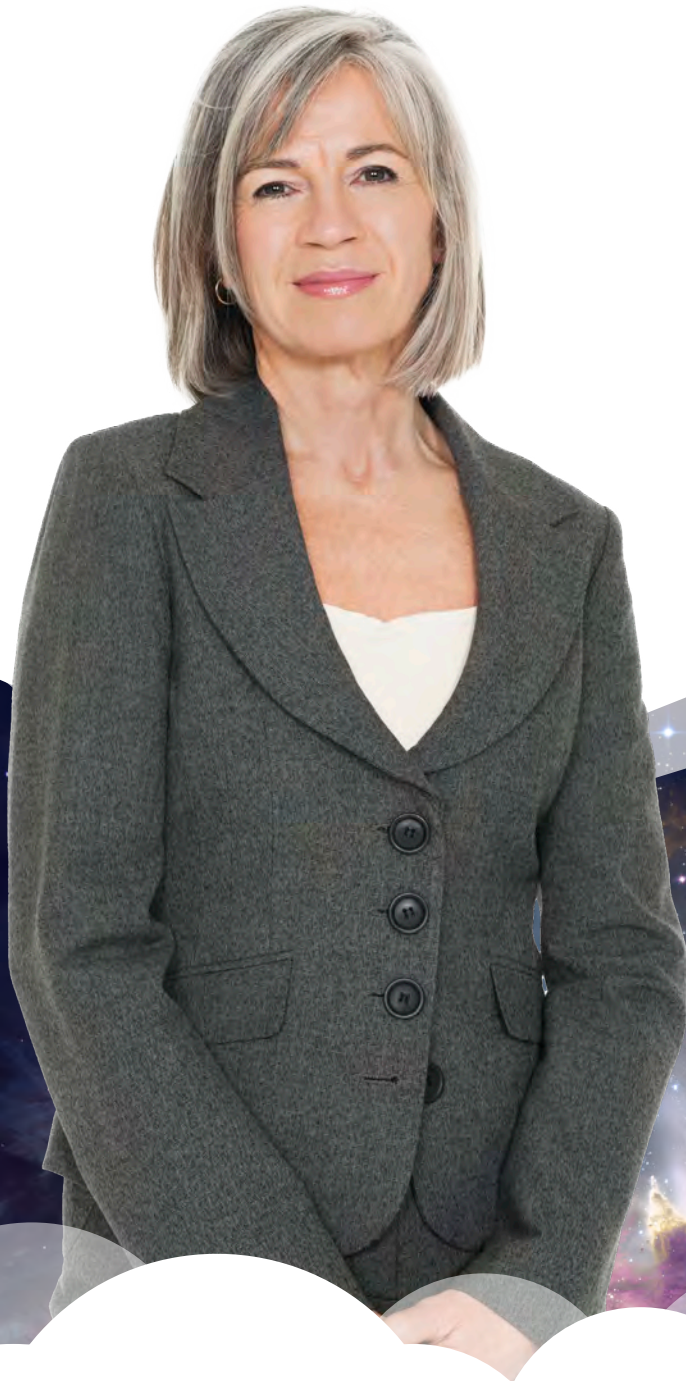
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# Navigating the fraud funnel

## Protecting qualitative research from participant deception

| By Julia Isaacs and Shira Glickman

### abstract

The authors explore insights from their investigation into the world of fraudulent participants and their strategies for maintaining the integrity of qualitative insights.

In the summer of 2022, KNow Research, a qualitatively focused research agency, embarked on an internal project to better understand the widespread issue of participant fraud within the insights industry. The motivation for this investigation arose from a significant 19% uptick in the presence of bad actors infiltrating our virtual fieldwork. Recognizing that this issue extended beyond just our organization, we started an exploration to gain a broader understanding of the issue and ensure that the insights we gather truly stem from genuine human experiences.

Our goal: refine our internal practices and provide thought-starters and resources to the insights industry as a whole to protect the integrity of qualitative insights and avoid scenarios like this:

You recruit 12 participants for one-on-one interviews from a quantitative study that targeted U.S.-based, C-suite professionals. You do your due diligence to invite those who gave thoughtful and relevant responses in the initial quant survey. You schedule follow-up interviews and, to your initial delight, you hit the nail on the head with some outstanding professionals who were exactly who you hoped had taken your survey!

Until you meet "George Henry," a participant who claims to be a CEO of a New York City-based tech company. The time arrives, you're on the line and "George" enters the virtual room, though he doesn't turn on his camera. You greet him and ask that he kindly turn on his webcam. He claims to struggle to figure out how to do this and asks if it's necessary. You remind him that this was part of the criteria laid out for the study and that he try again. At last, his camera turns on and you see a shadowy figure in a dim room. You ask if he can turn a light on or move into a brighter area, to which he replies that he doesn't have a brighter room.

You begin the conversation with a typical warmup – what do you do for work and for fun? To which "George" replies with a vague answer that's difficult to understand. You proceed with some questions to confirm his

role in topic of the research, to which he answers cryptically, "Yes, I decide on that, and think are important to employees." He is soft-spoken and with a thick accent and you worry: He does not appear to be CEO of a New York tech company but how can you know for sure? After a couple minutes of choppy, elusive conversation, you make the call that he is not in fact the person he claims to be and dismiss him, though without any concrete evidence. You feel uncomfortable and awkward in doing so – what do you say? You decide to use the excuse of a bad connection and that you can't hear him well enough to proceed, thank him for his time and end the call. You later confirm by running his IP address that "George" was located outside the U.S. Your suspicions were right – he was not who you thought he was nor needed for your study. You're now down one interview, don't know how to explain the situation to your stakeholders, are concerned about the quality of the overall sample and don't know how to prevent this from happening again on this study – or any other for that matter.

## Defining truth and validity in qualitative research

As qualitative researchers, we are compelled to be lifelong searchers of truth, acting as conduits between the humans who offer seeds of their truth and the stakeholders eager to plant and cultivate them into strategic decisions. The inherent nature of our research positions us perfectly to serve this very purpose, as our immersive methodologies and organic conversations enable us to gain profound insights into the behaviors, motivations and feelings of the diverse audiences we engage with.

As any researcher will tell you, your insights are only as good as your participants. We recognize that the quality and validity of our research depends entirely on the human voices that contribute to it. In qualitative research, researchers often rely on a limited number of participants to gain insights into a larger cohort or population. The ripple of even one

person stretching the truth about their identity or experiences can undermine the validity of the entire research endeavor. Therefore, recruiting diverse and knowledgeable participants can be regarded as the most important step in the qualitative research process.

## Go straight to the source

In the beginning of 2021, our company saw a large uptick in fraudulent instances, regardless of recruitment method. This prompted us to launch our own initiative to unpack the problem at large, which included going straight to the source – the fraudulent participants themselves. Through our investigation, we discovered that participant quality in qualitative research varies along a spectrum, reflecting the degree to which participants may bend the truth to qualify for a study.

**Type 1: Ideal participants.** Thoughtful responders, meaningfully contribute to the conversation and honestly represent the target audience. May participate in studies as a part-time job but never as a full-time occupation.

**Type 2: Less-ideal participants.** May rush through questions and provide bare-minimum responses in the initial screener. This cohort can be considered "professional participants," as their full-time occupation revolves around actively seeking research studies and finding ways to game the system to qualify for a study (e.g., lying about their age or other demographics).

**Type 3: Fraudulent participants**. The most severe level of fraud. These individuals intentionally and significantly alter their identities, creating personas that bear no resemblance to their true selves and make up information about the topic at hand.

To learn directly from the less-ideal and fraudulent participants that had been infiltrating our studies, we adopted a two-pronged approach. First, we conducted an in-person focus group with professional participants of the less-ideal type, individuals who had taken part in five or more studies in the past year. Next, we conducted virtual, one-on-one interviews with fraudulent participants, individuals who had attempted to join previous studies but were outed as falsely claiming to be based in the U.S. through IP address scans. We also discov-

## Participant Quality Spectrum

**Type 1: Ideal**

Thoughtful responses, takes time to read, understand and respond fully. Represents the intended target audience. Doesn't participate too often.

**Type 2: Less Ideal**

Rushes through or provides bare-minimum responses. May be repeat participants who seek studies often and bend the truth to qualify.

**Type 3: Fraudulent**

Lies about who they are or where they live to qualify for research studies.

Our focus

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ered this cohort uses virtual private networks (VPNs) to mask their true location.

## Findings from Type 2 respondents

We conducted an in-person focus group to learn from this cohort. These individuals were open and eloquent, offering extensive, detailed explanations in their responses, and were quite transparent – everything a qualitative researcher could ask for. However, they violated industry recruitment best practices. In participant screeners, along with the standard demographic questions, we build in questions to weed out people who have taken research studies recently and studies on the topic of interest. This group has typically figured out ways around these questions and they often bend the truth to make their way into studies.

Here's what we learned about the world of a professional participant:

- They proactively scan the web for studies in places like social media, Craigslist and Reddit.
- Age is the most common aspect respondents may lie about to participate – they know what the cutoffs tend to be.
- Some told us that they were encouraged to stretch the truth in a screener to qualify for a study.
- For many, qualitative research is their main source of income, drawing an average monthly income of $3,000-$5,000.

## Findings from Type 3 respondents

We conducted webcam interviews to learn from this group and carefully recruited participants whom we had previously identified as fraudulent – the ones we had to awkwardly dismiss from interviews and groups. We began like we would any other study – sending out an invite to a list of e-mails we had collected from past studies with a link for them to book a slot to discuss "the research experience" with us for a $50 incentive. We opened up a variety of slots to allow participants flexibility to book but did not anticipate what happened next: within minutes, we had 100+ signups! The invitation link had been passed around like wildfire. Retrospectively we should have anticipated this – of course the link was shared to a broad network; we are recruiting fraudulent participants! We canceled those who were not on our original list, saying that it was only open to those on our original database.

These participants are very good at sticking to their stories or the personas/characters that they create to qualify for a study. Even when presented with their discrepancies in their locations or stories, they refused to budge, insisting they were telling the truth. Here's what we learned from the fraudulent respondents:

- All had IP address discrepancies and made excuses (i.e., visiting relatives or had traveled to a different coast at the time that they signed up for our study) for the different time zones.

- Many had blacklisted IP addresses or VPNs, which was determined by using a screening tool to detect fraudulent web activity (IPQualityScore).
- Many used a Google Voice number to maintain anonymity.
- Most preferred digital, non-brand-specific gift cards but were not opposed to mailed incentives. We later discovered that some scammers use a U.S. post office box and have a locally based person collect incentives to then mail or deposit to their actual address or account.

We also collaborated with our expert partners, including panel providers and recruiters, who play a crucial role in finding high-quality participants for our studies. Their perspectives helped our team compile a list of proactive and reactive measures to ensure quality participants.

## Proactive measures

- Prescreen via phone, being wary of Google Voice users.
- Include and review open-ended responses and trick questions in surveys and screeners.
- Use video audition questions in the screening process.
- Lock survey links so they can't be shared.
- Use automated tools that screen for habitual survey-taking, inattentive responses and scanning for bot farm networks.
- IP-screen (digital fingerprinting) to examine participants' past activity,

Figure 2

**Goal: Catch Fraudsters at the Top of the Funnel**

**Identify as many bad actors (and bots) in this early stage as possible**

**Additional bad actors can be found during the confirmation/scheduling process**

**Ideally, none of the bad actors make it through to this last phase of the study...but some still do!**

**The Fraud Funnel**

Panel-Building, Surveys and/or Screeners

Scheduling

Fieldwork

**Detection Strategies**

- **Tools and methods for detecting problematic respondents (see Insight Association's Data Integrity Toolkit)**
- **Routine data-cleaning**

- **IP address-checking (blacklisted VPN, non-U.S.-based IP address)**
- **Phone call (re)screening**
- **Video articulation questions**

Moderator to dismiss participant if they:
- refuse to come on-camera
- answer in vague, general terms, give incorrect information and/or contradict themselves

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e.g., frequent survey-taking or other acts of fraud.

- Keep fraudulent participants in a database, as opposed to removing them. This provides a log of fraudulent activity and decreases the likelihood of bad actors attempting to join the panel again under a different identity.

**Reactive measures**
- Go back to your proactive tools if you notice fraud popping up once you're in field.
- Re-screen recruited participants in the virtual waiting room before a session begins.
- Ask warm-up questions that give you confidence that they are who/where they say they are, e.g., weather-related questions, specific questions about their work and where they are located (while cross-checking their IP location).
- If you still aren't confident, you can ask then to show their photo ID to verify their identity (use at your own comfort level and discretion).

Through our research, our team developed the concept of the "fraud funnel," which identifies three levels of fraudulent instances: the initial screening, participant scheduling and fieldwork. Organizations should aim to detect and remove bad actors at the earliest stage in the funnel before they reach the coveted fieldwork seats.

## Anticipate and prevent

Fraud and scams in research, like in any other industry, can never be completely eradicated. Instead, it is important for organizations to proactively anticipate and prevent them to the best extent possible. The focus should shift from asking if fraud will occur in a study to understanding to what extent it may happen, with the goal of minimizing its impact at the very top of the fraud funnel.

Since implementing our safeguards, we have seen fraud incidents mid-fieldwork drop from 19% to 2.7%, with a huge uptick in participants caught proactively higher up in the funnel. We encourage the wider research community to evaluate their best practices of mitigating qualitative fraud and continue this conversation, in the spirit of creating an industry that is firmly grounded in qualitative truth. 🟠

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R E F E R E N C E S
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••• the business of research

# Plotting your next move

## 5 key questions to help you choose a research methodology

| By David Lyndon

### abstract

This simplified approach to choosing the right methodology uses five questions to guide researchers in determining whether to opt for secondary, qualitative or quantitative research and emphasizes the importance of aligning the chosen method with the target audience and research goals.

Here at our firm, our team was recently asked to recommend a research approach by a client without previous research experience. Our conversations revolved around five key questions and eventually turned into the accompanying flowchart. Use these five questions to simplify the research methodology decision-making:

• Has the same research already been done?
• How hard is it to reach my target respondents?
• What sort of answers do I need?
• Are my respondents in one specific location?
• How reactive does the research need to be as it continues?

Doubtless, each situation will need more thought than the simple diagram shown in the flowchart but I hope that common sense can fill in the gaps.

If you're in the same situation as our stick figure in the flowchart – wanting to do some research but uncertain of the best methodology – work through the questions in the flowchart and see if the resulting strategy makes sense. (Perhaps it's more than one!)

### Principles should be clear

This is a broad-brushstroke look at reasons to use different research methodologies and why you might choose one over the other but the principles should be clear.

The proper methodology is found at the intersection of who you want to talk to and what you want to know. The five questions, asked in the right way, can guide your decision-making.

We've explained more about each methodology below and how the answers to the five questions can cause you to choose them.

**Secondary research.** Secondary research takes many forms but primarily consists of finding and reading what other researchers have already done. Using the internet, what used to take weeks can be completed in minutes. Academic reviews, social media searches and basic web searches can quickly tell you if someone else has already answered your questions or gathered the data to allow you to do so.

Choose this type of research if you know the work's already been done. If you're not sure, take the time to do some secondary research and find out. It may save you weeks of effort and thousands of dollars.

After this review, you can think about some primary research if there are still unanswered questions or if the available data is out of date.

**Primary research.** Necessary when you need to get data that is not readily available, primary research is usually more demanding, more prolonged and more expensive than secondary research. However, it can be much more valuable. Primary research is often split into two types – qualitative and quantitative.

**Qualitative research.** Qualitative research is descriptive rather than definitive. Digging deeper into experiences, reasons and opinions, qualitative researchers use observation and conversation to understand the answers to questions like why and how.

### In-depth one-on-one interviews

In-depth interviews allow researchers to dig deep into a topic with a few people. We often use these to reach experts who can bring their experience and observations to bear on complex subjects that only a few people understand.

We choose in-depth interviews when the people who can answer our questions are hard to reach. Because of their expertise, their time is valu-able, so scheduling interviews and compensating these individuals takes effort and money.

We often use in-depth interviews to talk to CEOs in specific industries, members of think tanks or political policy experts.

### In-person focus groups

Focus groups are a tried and proven method if you need to explore a particular topic and discover ideas you've not yet considered. Get a small number of people (six-to-10) in the same room and have a guided conversation. The strength of focus groups is when different members connect and spark new avenues to explore. Multiple groups with different demographics or opinions round out the results.

A well-moderated focus group is an excellent choice if you can gather these people in one place and want to dig into the why and how of a subject. There's also a chance to do some small quantitative exercises and ask about who, what, where, when and how much, but the small number of responses means these results are guidelines at best.

### Online focus groups

If you want the benefits of focus groups but can't gather everyone in one place, don't despair. Online focus groups have come of age. Either chat-based or video-based groups can work. Chat-based groups can even be better when discussing emotionally challenging topics to help respondents feel free to share without having to face other people.

These groups still aim to understand a subject's why and how and need experienced moderators. Polls and ranking exercises can also add quantitative data but the small number of responses still means these results are guidelines at best.

### Online communities

Unlike focus groups, online communities run asynchronously and last for days or weeks. Think of online communities like a temporary Facebook group with message boards, comments, polls, photos, videos and almost anything else

**A simplified flow chart for deciding what market research methodology to pursue**

Actor

I need to do some research

Has the same research already been done?
- Yes
- I don't know
- No

How hard is it to reach my target respondents?
- Very hard / Very expensive / Not many of these people exist
- Somewhat hard / Somewhat expensive / A few of these people exist
- Easy / Cheap / Many exist

What sort of answers do I need?
- Why / How
- Mix
- What / Where / When / Who

What sort of answers do I need?
- Why / How
- Mix
- What / Where / When / Who

Are my respondents in one specific location?
- Yes
- No

How much time do I have?
- Days
- Weeks

Are my respondents in one specific location?
- Yes
- No

Are my respondents in one specific location?
- Yes
- No

**Secondary**
- Academic / Media / Social Search

**Qualitative**
- In-depth one-on-one interviews
- Online focus groups
- Online communities
- Focus groups

**Quantitative**
- On-location surveys
- Online specialist panel survey
- Online consumer panel advanced survey
- Online consumer panel basic survey

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you can imagine, guided by your research questions.

Because participants don't all need to be online simultaneously, you can include many more people than a focus group. We've done communities as small as 12 people and as large as 200.

And with the extended time frame, you have time to think about what you want to ask and adjust as time goes on or dig into particular topics with subgroups. Online communities are one of the most agile forms of research. They are mainly used like focus groups to explore subjects qualitatively but can also be large enough to achieve quantitative results.

**Quantitative research.** You need to do quantitative research if you're trying to prove a hypothesis or get statistics to drive PR and media headlines. This is all about the numbers, but unlike qualitative research, you only really get out what you put in. If you forget to include a question, there's no chance to correct it. Quantitative researchers use predefined answer choices to answer who, what, when and

where. This type of data then allows for analyses like segmentation, driver and principal components.

**Basic online consumer surveys**
If you want to know what general consumers in your market think and do, an online survey is quick, simple and cost-effective. You can ask a lot of single-choice or multiple-choice questions and gather hundreds of data points in a matter of hours or days.

Even better, if you're reaching people across different languages, you can translate your survey into their language but get the answers back in your language. Truly global research is possible for everyone.

Whereas phone-based research used to be preferable, with internet penetration rising and well over 90% in places like the U.K. and the U.S., you can easily reach a representative sample. Good screeners, quotas and weighting strategies also minimize natural bias.

**Advanced online consumer surveys**
If simple answers to closed-end questions can't meet your needs but you still need to reach many people across languages, geographies and the social spectrum, more advanced online survey options exist.

You can incorporate video, audio, interactive communications, gamification, message highlighting and other next-gen tools into a laptop or mobile-device survey. Find out what people look at in stores, what they hate about your planned advertisement or what draws their attention when they see your new website.

Setting up an online survey experience like this can be a lot of work but the results can be invaluable.

**Online specialist surveys**
Sometimes your target audience is smaller and more defined. Perhaps you're trying to reach decision-makers in companies using AI or part-time workers who spend their spare time making YouTube videos. These niche audiences can usually be found in a spe-

cialist panel. They are more expensive to reach because the panel company must spend more to attract and engage them and you won't be able to reach as many of them as general consumers. Still, you can get robust data from specialist groups worldwide through online surveys.

In other cases, you might have access to your audience yourself. They might be your customers or your employees. Perhaps there's a hybrid approach, where you get some of your audience from a panel and some from your own database. You can set up an online survey and do quantitative research with this audience in these cases.

### On-location surveys

Sometimes there's no better way to reach your audience and find out what they think than to go to them in person. Whether you're finding shoppers at the mall, workers in a factory or voters outside the polls, going and doing the research on-site is a guaranteed way to gather your data.

Interviewers can ask respondents to take a survey on a dedicated iPad, snap a QR code to take the survey on their own device or talk the respondent through the survey and record the answers.

This is slower and more time-intensive than reaching people online but it can be the best alternative when the target audience is difficult to reach and their usual location is known.

### Navigate the maze of choices

Selecting the right research methodology is a crucial step in any research endeavor. The five key questions outlined in the flowchart serve as a valuable compass, helping you navigate through the maze of choices and ultimately guiding you to the methodology that best suits your objectives. While the decision-making process may often require additional consideration and nuance, the principles remain clear: your choice should be at the intersection of your target audience and your research goals. Whether you opt for secondary research to leverage existing knowledge, delve into qualitative research for

deeper insights or harness the power of quantitative research for statistical validation, the method should align with your unique circumstances. Furthermore, the emergence of online tools and communities has expanded the horizons of research possibilities, offering flexibility and scalability. So, remember to weigh the options carefully, use these questions as your guide and embark on your research journey with confidence, knowing that the right methodology is within your reach.

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# Be there for them

## Navigating challenges of MedTech research with rare-disease patients

| By Tom Donnelly, Dan Buckley, Amanda Pirraglia and Andrew Watson

### abstract

Whether via in-person, in-home or virtual interviews, an effective strategy for marketing research with rare-disease patients requires empathy, flexibility and creativity in recruitment, moderating and analysis.

As technology advances there is a growing array of MedTech solutions – wearables, voice-activated devices, telehealth, etc. – to better support patients in their daily lives. However, MedTech research with rare-disease patients presents several unique challenges that must be considered. Ideally, interviews would be in-person in a central location to observe device use; the rarity of the condition can lead to the need for a hybrid methodological approach. In this article, we will: provide some background on rare disease and how research can be different in this population; describe different methodological approaches, respondent configurations and recruitment considerations; and discuss aspects of moderation and analysis.

### Background

A rare disease affects less than 500 in 1,000,000 people (0.05% prevalence). Definitions vary slightly: in Europe, a rare disease affects less than 1 in 2,000, while in the U.S. it affects less than 200,000 people.[1] Overall rare diseases affect up to 6% of the world population (~1 in 20) and about 80% of rare diseases have a genetic origin. Sadly only ~5% have an approved treatment.[2]

Further subclassification can help to define those indications that are ultra-rare or those that have orphan disease status. The definition of an ultra-rare disease in Europe is that it affects less than 20 in 1,000,000, while the U.S. has no distinction for ultra-rare.[3] Approximately 85% of the rare diseases have an incidence of less than 1 in a million (0.0001).

Orphan status may be for a rare or common condition (e.g., malaria, which has 3 million cases/year). Often, they are for rare diseases because of a small patient universe making it harder to conduct clinical trials. In the U.S., the Orphan Drug Act (1983) provides incentives for the development of drugs to treat rare diseases including seven years of market exclusivity after approval.

## Unique frustration with rare diseases

How are rare diseases different? There can be a lot of unique frustration with rare diseases, both for patients and health care practitioners (HCPs). Patients may have been searching for some time and been shuffled among different HCPs and complementary care, possibly having been misdiagnosed and/or dismissed along the way. By the time they receive their right diagnosis, some feel vindicated ("I told you so") and relieved. However, they may feel that the general population does not understand their condition or have empathy for their experience. Even once a proper diagnosis is made, there may be limited options for treatment and often no cure. This can make dealing with the rare disease unfulfilling for HCPs and extremely frustrating for patients and caregivers. Additionally, having a community to turn to for educational and emotional support is essential, but even after a proper diagnosis, patients with rare diseases may find that support is limited, preventing them from connecting with other patients, caregivers or access to health care.

For general practitioners, and even some specialists, symptoms of a rare disease may resemble other more common diseases or may be something they have never seen or even heard of before. For many rare conditions, education throughout schooling on the disease may be limited. We have heard doctors express that a condition in its entirety was covered in one class setting in medical school because of its rarity, thus preventing them from identifying the symptoms in practice when presented with a patient case.

Doctors themselves are also frustrated with the unmet support and treatment needs for their rare disease patients. Two specific areas where our hybrid MedTech approaches have been used to provide insights on these unmet needs are Friedreich's ataxia (FA) and spinal muscular atrophy (SMA).

Friedreich's ataxia is a rare, inherited, degenerative disease.[4] It damages the spinal cord, peripheral nerves and the cerebellum portion of the brain. This condition tends to develop in children and teens and gradually worsens over time. Unsteady, awkward movements and a loss of sensation due to nerve injury develop as the disease progresses. Symptoms of Friedreich's ataxia often start between ages 5 and 15, although they can develop later in life.[5] Symptoms include: trouble walking, possibly the need for a wheelchair; limited dexterity and fine-motor skill; tiredness; slow or slurred speech.

Spinal muscular atrophy is a disorder affecting the motor neurons – nerve cells that control voluntary muscle movement.[6] These cells are located in the spinal cord. Because the muscles cannot respond to signals from the nerves, they atrophy – weaken and shrink – from inactivity.

SMA is classified into four different types that appear as a scale of severity, where Type 1 is the most severe and typically presents with symptoms within the first six months of infancy, while Type 4 rarely has an impact on life expectancy.[7] One in every 6,000 babies is born with SMA. It is one of the most prevalent genetic disorders affecting young children and a major cause of death in infancy. SMA can strike children in infancy or as they grow into adolescence. SMA in infancy and early childhood is associated with worse outcomes, while patients who develop symptoms later in childhood or in adolescence usually have a more positive prognosis. Symptoms include:[8] weakened muscles closest to the center of the body, including the shoulders, hips, thighs and upper back; difficulty breathing and swallowing.

## Approaches to rare-disease patient research

Conducting marketing research and human factors with rare-disease patients is challenging for many reasons. First, it is ideal to conduct the research in-person in a central location facility to observe device use. This allows the research team to discuss feedback live, as well as be on-hand to fix any malfunctioning devices. However, due to the rare nature of these condi-

tions, recruiting a reasonable sample size into a given research location is unlikely. Second, the abilities of respondents may be limited depending on the severity of their rare-disease symptoms – which can vary within a given condition. For example, FA patients have increasing dexterity challenges over time, which will impact their ability to manipulate a medical device. As another example, SMA patients with muscles that have started to atrophy may have difficulty sitting up through an entire interview.

Given such challenges, both the methodology and recruitment must be flexible, allowing a combination of in-person interviews in a facility, in-home interviews and virtual interviews. As shown in Figure 1 and described below, there are advantages and disadvantages of each approach. In addition, a combination of interviewing patients and/or caregivers should also be considered. In some conditions, interviews with patients can be difficult, such as pediatric patients or those with cognitive deficits. Having a caregiver participate can aid in gathering feedback. We will review these interview methods and respondent configurations.

**Interview methods.** The gold-standard interview method is the in-person in-depth interview (IDI) in a central location facility with clients observing in the backroom. There are many advantages in conducting MedTech research with this approach. Most importantly, this allows hands-on use of devices you are testing. The client team can watch live as a group to discuss insights and provide feedback to the moderator. Clients are less likely to be distracted, as they might be in their work or home office. In addition, if a device breaks, the research team is on-site to make the appropriate modifications.

Though the most efficient method, there are disadvantages to consider with in-person interviewing. Given that the research is conducted on a specific day in a specific location, respondents, clients and researchers must all travel and be on schedule. Doctor and other types of health care appointments may be frequently on calendar for rare-disease patients, thus causing a disruption in potentially having to rearrange appointments to accommodate both the travel and time needed to participate in the interview. Patients may be reliant on their caregivers to assist them in participation, thus potentially having

to consider accommodating caregivers' schedules as well. Travelling may be particularly challenging for respondents, such as those with mobility or accessibility issues (e.g., FA, SMA). And finally, you lose the opportunity to observe how the patient interacts with the device in their home environment.

Conducting interviews at a patient's home provides important real-world context of the medical device use, which can have implications for device design. If you include video streaming, clients can engage in the research and provide live feedback during the interview. As with IDIs, you get feedback from respondents with hands-on use of the device. This approach is easier for respondents because they do not need to travel, however, travel for the moderator can be taxing, expensive and lengthens the timeline. While clients can watch live, there is no virtual backroom and there can be disruptions in the signal due to unstable wi-fi/cellular signal. When devices malfunction, client engineers are not on-site to fix them. Also, additional compliance considerations are needed (e.g., consent from others in the home, personal information shown on camera) and

## Figure 1: Advantages and disadvantages of three interview methodologies: in-person in-depth, in-home and webcam

| Methodologies | **IDI in Facility** | **In-Home Interview** | **Webcam Interview** |
|---|---|---|---|
| | 1-on-1 interviews at a central location | Respondent's home with video streaming | Virtual interview with webcam |
| **Advantages** | • Hands-on use of device<br>• Malfunctions fixed on-site<br>• Individual opinions<br>• Convene in one spot<br>• Clients watch live and interact<br>• Provide moderator probes | • Hands-on use of device<br>• Easier for respondent (in their home)<br>• See context of device use<br>• Live remote watching | • Greater geographic dispersion<br>• Easier for respondent and moderator<br>• Faster and less expensive<br>• Has a virtual backroom for team interactions and probes |
| **Disadvantages** | • Booked on specific day/location<br>• Difficult for respondents to travel<br>• Do not see home environments | • Moderator travel: more time/cost<br>• Device malfunctions not fixed<br>• Respondent may reject approach<br>• Wi-fi/cellular service disruptions<br>• No virtual backroom | • Use video/animation demos or logistics/cost of shipping devices<br>• Device malfunctions not fixed<br>• Less client team interaction vs. in-person research |

respondents may reject the approach because of privacy issues.

Webcam interviews are a popular alternative, where you conduct a virtual interview through a platform using a webcam. With device testing, you need to use virtual stimuli (e.g., images, animation, videos) or ship devices to respondents. This approach has the potential advantages of having a wider geographic dispersion of respondents, as well as being able to field more quickly and be lower in costs due to no travel. The approach is easier for respondents, moderators and clients because there is no travel required. Most virtual platforms have a virtual backroom, allowing client interactions and moderator probes. However, clients may be less engaged compared to attending in person research.

Regardless of the interview technique chosen, it is essential for the moderator to be trained in using the device before fieldwork commences. The moderator should ideally have the opportunity to test the device on their own time to play around and become familiar with its functionality. At the very least, a training session on how to appropriately use the device should be required, so that if patients have questions on it while in field, the moderator can properly address.

**Device shipment logistics.** Shipping medical devices for research takes planning, added time and costs. You must consider the geographic locations (e.g., U.S., EU5, other) and type of equipment/materials. When shipping internationally, review the specific customs rules for each country. A key logistical issue experienced when shipping devices is airports retaining the devices when the contents contained within the box are unclear or potentially considered hazardous. This can especially be a hassle when transporting the devices internationally. You will need detailed documentation of what is in each box with counts, along with the purpose of the market research. This detail written on a letterhead could help formalize the transport. If you are shipping through mail to respondents (e.g., for webcam interviews), you run the risk that they do not ship it back or that it gets lost in mail. For more information, see a prior Quirk's article, "Stimulating simulations: strategies for conducting global device testing" (November/December 2021).

Another potential challenge to consider with device logistics is its functionality, particularly if the devices break. In that instance, the interview would need to be rescheduled after a new device is delivered. We have had success using a courier service to speed up field time; however that adds additional cost to the budget. For more information on this approach, see a prior Quirk's article on virtual observation: "Watch and learn: the power of observation and iteration" (May/June 2021).

**Respondent configurations.** When conducting research with rare-disease patients, the respondent configuration needs to be flexible, whether you interview only the patient, only the caregiver or both together. Each individual approach has advantages and disadvantages, as shown in Figure 2 and detailed below.

Interviewing patients provides an in-depth, unbiased, individual opinion in the patient's own perspective. Interviewing the caregiver will be needed if the patient has a cognitive deficit, is too young to be interviewed or has passed away. They can give their in-depth, unbiased, individual opinions from their perspective. Sometimes the caregiver knows more than the patient. However, the caregiver is not the patient.

Research can be done with both the patient and the caregiver. In this way, you can get the best of both worlds, receiving both points of view. Also, they each may remind the other about forgotten information (e.g., which specialist they went to initially versus



Figure 2: Overview of three respondent configurations

| | Patient Only | Caregiver Only | Patient + Caregiver |
|---|---|---|---|
| **Advantages** | • Patient's own perspective<br>• Unbiased, individual opinion<br>• In-depth information about the patient's journey and experience | • Caregiver (CG) may know more than the patient (e.g., cognitive deficit, pediatric patient)<br>• Unbiased, individual opinions<br>• In-depth information about the journey from a CG perspective<br>• Helpful for dementia patients | • Receive both caregiver and patient perspectives<br>• Each may remind the other about information<br>• Useful when interviewing children because you can get their input with the help of parent |
| **Disadvantages** | • May get poor feedback if patient has a cognitive deficit<br>• Patient could be too young to be interviewed or may have passed away | • Caregiver is not the patient | • Respondents can bias each other |

getting a final diagnosis). This approach is useful when interviewing children – because you can get their input with the help of parent – as well as for those with cognitive deficits. Both the patient and caregiver have different milestones that are important and specific to them in their journeys, so interviewing both allows you to capture both and compare and contrast the milestones. The downside of this approach is that respondents can bias each other. A workaround is to have part of the interview with only the patient, part with only the caregiver and part with both. Of course, this leads to a longer interview.

**Recruitment considerations.**
Recruitment for rare-disease patients is particularly challenging due to the rarity of the condition. Beyond the flexibility mentioned in the research method and respondent configurations, the recruitment criteria must also be considered. Longer timelines and larger budgets will also be required compared to more traditional conditions.

The recruitment team should select the most suitable recruitment models depending on project requirements, cultural nuances and legal requirements. Some approaches include clinical, advocacy, media and technical outreach, as well as targeting areas with treatment centers. Using clinical outreach to find the right patient through health care professionals is often an effective approach. While this will add to the costs of the recruitment, it ensures the correct patients are identified. Advocacy outreach is used to find the right patients through non-clinical support networks. This was extremely useful in the past but there is significant variability in the size and engagement of these advocacy groups in the rare disease space. Using online groups is often more effective and is more geographically diverse. This can lead to extra cost and time but can enrich insights. Media outreach through film and animation to deliver promotional material relating to the project both for the finder and patient efficiently expands the reach of recruitment effort. Efforts using technological outreach for precision targeting of knowledge leaders, health care practitioners and sites within given geography is also effective. Another approach

is targeting areas with key treatment centers to find enough respondents close to one another and able to refer others in their area.

For every project, there are also situational considerations that may impact what approach may be best. For an at-home project in 2022, recruitment and research methods had to consider patients' concerns with COVID-19. Significant time was spent with each patient to reassure them of the moderator's vaccine status and taking tests to be sure they felt comfortable. The issue may not always be a pandemic but each project has its own unique considerations for the time needed for individual challenges to be addressed. The research and recruitment teams need to be patient-centric with individual understanding and flexibility. The team should account for ample time to ship devices and/or for moderators traveling for in-home research.

## Approaches to moderating

As with all qualitative research, moderating skills are key to success. For patient research, it is especially important to keep certain factors in mind and find ways to overcome those challenges. Given it is a rare disease, the patient may have never participated in marketing research. In this case, it is vital to first build rapport with each patient. As a simple example, when you ask about their hobbies or other background information, be sure to relate to a detail with something about yourself, such as a related hobby.

As discussed with recruitment, all parties (recruiter, moderator) must be privy to what each patient desired in their interactions. For instance, moderator vaccine status, wearing a mask and conducting the interview outdoors may be important factors for certain patients. As always, you must ensure there are proper consents in place prior to the interview and that the moderator is aware of all the requirements. For example, depending on the condition and its severity, some patients will opt out of webcam interviews and it is essential for the moderator to know this beforehand to avoid beginning the interview with the expectation that the patient will be seen on screen or putting pressure on the patient to do so.

Good moderators know that questions should not be leading and should be appropriate for the patient type. In the case of rare disease patients, every interview is crucial, so you should make sure questioning is relevant for the condition and to the specific patient. The discussion guide should be considered just that – a guide – and the moderator should be empowered to go off-script to tailor the discussion.

One way to do that is to review any pre-task activities done by the respondent. The pre-task activities provide a more holistic understanding of the patient disease experience, allowing the patient to describe their condition and its impact in their own terms and in their own time. In a pre-task, the patient provides information about their background and experience, which can be in a written, audio or video format. Pre-tasks are a very individualized activity and generally tend to focus on the milestones that are important to them.

When trying to elicit emotional or less consciously available thoughts, projective techniques can be useful. Projective techniques are used as mechanisms for bringing to the surface feelings and associations that are not immediately conscious. The principle of projection is that people can give voice to underlying feelings by projecting them onto someone or something else. The principle of enabling is that people are provided with mechanisms that help them express thoughts, ideas or emotions where language is not readily available or where these have not been previously consciously thought about. They are designed to give people ways of accessing, structuring and expressing/articulating thoughts and feelings. This is especially crucial in patient research. Many key milestones in journeys, such as receiving a diagnosis, may be difficult to recall or speak about. Children may find it challenging to articulate their thoughts and perceptions towards their condition. Projective techniques can aid in overcoming some of those barriers.

## Approaches to analysis

During the research, there are different types of data that may be collected. Moderators make specific observations and provide ratings based on their per-

ception. This is often done live during the interview using a moderator sheet, as well as afterwards upon reviewing the recordings. For device-testing research, observational analysis is even more important than traditional probing typically used in qualitative research; for example, the respondent might say the device is very easy to use but may actually appear to be fumbling with it or perform the procedure incorrectly. There also may be a knowledge task for the respondents that would allow us to capture this after they have learned a new procedure. Respondents can provide qualitative feedback and ratings on specific metrics during the interview. All of this information can be included in the analysis and reporting (see Figure 3).

Consider whether analyses should be done separately by type of respondent or method, because some approaches may be given more weight (e.g., in person hands-on usability vs. virtual interviews with images). In typical qualitative marketing research, we tend to avoid counts and use terms such as many, some and few. However, in device research, human factors engineers require specific numbers. When use of a device is observed, the frequency of behaviors that deviate from the appropriate use is reported. These all help the research team determine user needs, potential design updates and whether the use-related risks are

acceptable. In the case of rare-disease patients, your sample size will be small, particularly within a given method and respondent configuration type.

The approach to reporting with patients is often very different from reporting marketing research with health care professionals. Typically, patient reports incorporate both the rational and emotional insights to capture patients' daily lives with their condition. As mentioned previously, each rare-disease patient journey is extremely individualized. Therefore, it may make sense not to aggregate findings and to create individual stories for each patient as silhouettes or spotlights, for example. Often, the smaller sample sizes that encompass rare-disease research, as mentioned previously, enable us to do so.

Deliverables are also very customized per project; creative deliverables outside of the standard PowerPoint report are often a nice supplement to the research. The nature of the pre-tasks or the interview itself may support the creation of interactive deliverables, such as a video or interactive patient journey link. This aids in bringing the patient journey to life.

## Flexibility required

MedTech research with rare-disease patients requires flexibility on the part of everyone involved to achieve study objectives: the respondents, recruiters,

moderators and clients. The methodology and recruitment must be flexible, allowing a combination of in-person interviews in a facility, in-home interviews and virtual interviews. A combination of interviewing patients and/ or their caregivers should be considered. Our hybrid approach to MedTech research with rare-disease patients has proved effective across a range of studies. Respondents and clients appreciate a flexible approach because it captures the study objectives while fitting into patients' real-life needs and the reality of the rarity of the disease. ⓞ

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Figure 3: Types of data collected and analyzed for MedTech research

Knowledge Task Data

Observation Data

Interview Data

Acceptable Use-Related Risks with No Additional Use-Related Risks Identified = "Pass"

Unacceptable Use-Related Risks and/or Additional Use-Related Risks Identified = "Fail"

*A degree of residual risk will remain, even if best practices have been followed in the design of the user interface. Goal is to address and minimize residual risk.*

# Keeping the focus

## How research can guide the innovation process

| By Eric Tayce

### abstract

Innovation's success hinges on a people-centric approach that combines creativity with consumer insights. By emphasizing research at every stage, from the initial landscape assessment to ideation and beyond, companies can illuminate future opportunities and forge a clear path to new ideas rooted in consumer needs.

On the surface, innovation may be construed as a purely creative exercise; gathering people in a room to brainstorm new, pie-in-the-sky ideas. However, successful innovation – the kind that delivers breakthrough growth for a business – requires an intentionally people-centric approach to decoding consumers' future needs and desires, leading to ideas that not only meet those needs but also strategically build upon the brand's existing strengths.

Executing that ideal image of an innovation process can feel overwhelming – unless, that is, research is deliberately leveraged at every step. The most successful innovation efforts place the entire team's focus on the intersection of creativity and human insight; relentlessly searching for what's real and relevant to the consumer target through every step of the process. As researchers, our role on an innovation team is to provide the data-driven foundation for the creative process, from beginning to end, untangling the intricacies of human behavior, emotions and needs to form the compass that keeps innovation pointing squarely towards the consumer.

A typical innovation process usually involves four phases: landscape assessment, ideation, optimization and launch. Research insights are most often visible in the concept optimization phase, after initial ideas have been sifted and taken shape. These insights are most often in the form of concept tests, feature and price optimization, claims and package testing and so forth. However, to infuse a truly people-centric perspective into an innovation process, research should serve a critical role in every phase – particularly in the landscape assessment, or what's also known as the "fuzzy front-end," where ambiguity abounds.

In this initial phase of innovation, the researcher's intent should be to keep the people you are trying to serve in the forefront of the conversation, while confirming the financial value to the businesses. Research

holds particular power at three unique points: illuminating a clearer view of fuzzy future opportunities; providing data-inspired projective consumer profiles; and maintaining human centricity by injecting consumer input.

**Illuminating a clearer view of fuzzy future opportunities.** Setting clear ambitions for innovation starts with outlining the opportunity landscape. This begins with a thorough audit of what we know and the development of a common "source of truth" about the business, the market and consumers – where they've been and where they are going. An audit also identifies any relevant knowledge gaps or unseen areas that may exist. Absent this foundation, innovation efforts can move in too many directions and fail to focus on (and find) the prize.

To evaluate opportunities identified in the landscape assessment, it is important to examine both external and internal forces that impact the success of the business. External forces involve the market, the competition, economic outlook, category trends and other information found in market assessments, trend reports, syndicated research and other sources of market intelligence. Internal forces involve examining the brand's strength and determining how far the brand can push innovation in the directions where success is most likely to happen.

Existing research can be very helpful in this effort to evaluate opportunities by providing insight into relevant consumer needs – referencing consumption audits, brand performance monitoring, segmentation, attitudes and usage, qualitative and more. However, data, while plentiful, is often insufficiently meaningful, of poor quality or not well-connected. It takes a collaborative approach between marketing strategists and researchers to effectively filter the trove of consumer, company and market context information into intentionally focused areas with the greatest potential impact for the business.

Advancements in generative AI are poised to accelerate the process of distilling and analyzing broad sets of disparate data sources – when used with proper testing for validity and reliability. Additionally, agile methodologies can provide efficient ways to fill knowledge gaps or add the voice of the consumer into these up-front foundational elements.

Regardless of what information, technologies or methodologies are available, every innovation effort needs to begin by setting a clear, data-informed goal for what success looks like for the business at hand.

For example, we led a global personal care brand through the process of assessing several personal care subcategories for transformative growth., Our work included an assessment of the viable targets, their need states, product trends in the market, the available technology at the client's disposal and the anticipated environment in their global markets, to arrive at innovation ambitions that could be supported both centrally and in the brand's many regions.

**Providing data-inspired projective consumer profiles.** Companies, in the development of new solutions, often use segmentation research to help set their targeting strategy. The outcome of this research, the segments, provides direction for business activity driving acquisition of new customers and penetration of existing ones. Segments can be tremendously useful to hone efforts for closer-in innovation efforts but they tend to fall short of providing a future-focused market view that leads to the development of long-range innovation pipelines. This is especially true if the segmentation research is not refreshed every few years. Absent this, the business will lack long-range design targets that further sharpen the execution of future-forward innovation ideas.

Steering ideation to meet the needs of future consumers requires the innovation team to use existing market segmentations as a starting point for building projective consumer profiles that represent the potential consumer of the future. Complementing or extending existing segmentations with sales data, social media insights, other available secondary information,

and/or using demand space segmentation if it is feasible or relevant, can help identify opportunities and new projective consumer profiles to serve.

One productive way these profiles may come to life is through the development of personas. A persona is a semi-fictional archetype that represents the key traits of a consumer group by combining demographics (age, gender, location), psychographics (attitudes, beliefs, lifestyle) and inferred perspectives (motivations, needs, tensions) to build lifelike characterizations that are action-oriented and inspiring to innovation teams.

Unlike a segmentation, which defines consumer groups based on behaviors, attitudes or needs, a persona imagines the personal qualities of a consumer group based on why they behave and feel a certain way, which ultimately fosters the inspiration and emotional empathy required for breakthrough innovation. As researchers, we contribute a consumer-informed, data-first perspective in the development of plausible projective personas, versus simply imagined or unrealistic ones, to continually keep innovation efforts centered on the human experience.

As an example, when we were tasked with helping a global food company with its innovation efforts in Africa, we used existing research bolstered by qualitative to develop personas that represented different groups and their attitudes towards nutrition. We profiled consumers based on their core personal motivations (learning, finding oneself, caring for others, etc.), their challenges with nutrition, their attitudes, beliefs, usage of packaged foods and what their typical day looks like. The distinct personas were brought to life with imagery and quotes to help the team put themselves in the shoes of the consumer in an unfamiliar market, allowing them to imagine how the consumers' needs might change over time.

**Maintaining human centricity by injecting consumer input.** Even the most well-meaning innovation efforts can fall victim to what is known as "innovation theater" – relying on "shiny" innovation activities that may feel like progress but in actuality lack a strategic north star. It's vital to maintain the discipline to focus on real consumer needs and business opportunities, especially as the creative elements of the process step into the spotlight.

Consumer insight can be incorporated into creative processes subtly yet powerfully, through touchpoints like innovation platforms or ideation activity design. However, elevating the consumer voice even further, consumers can be brought into the process as sounding boards to help gauge hypotheses, course-correct propositions and ultimately ensure ideas are laser-focused on true, relevant insights and needs.

As a research partner to innovation teams, recommending the best methodologies to engage consumers to enable this learning can illuminate opportunities to strengthen the process and ensure ideas will generate business growth. A wide variety of qualitative techniques can be deployed, even in the early stages of idea development, using approaches like ethnographies, online communities and side-by-side co-creation workshops.

For example, when a pet-treat company could feel its leadership position slipping as new entrants made inroads, we used consumer feedback to home in on key areas that were being missed by the competition to develop powerful innovation platforms. These insights found their way to strategic ideation sessions, and ultimately, a range of products that amounted to an innovation pipeline of launches in key markets around the world lasting more than five years.

## Real and relevant needs

What sets winning innovation apart is the ability to bring the human perspective into the process, from beginning to end. At the start, adopting a people-centric perspective helps to set a solid foundation for the innovation effort – rooting the project ambition in real and relevant needs and empowering the team to make informed decisions on what is needed to grow the business. As researchers, we can partner with marketing and innovation teams to look deeper at existing segmentation data to create a more humanized representation. Doing so not only brings to light pointedly relevant information but also breathes relatability into targeted consumer groups in order to inspire the empathy necessary to innovate. And finally, the consumer should remain front-and-center, even in the more creative legs of the process, inspiring processes, interjecting feedback and navigating towards the richest potential opportunities. When research insight is combined with creative and strategic inputs, companies gain true foresight and have a formula for breakthrough innovation. ⓞ

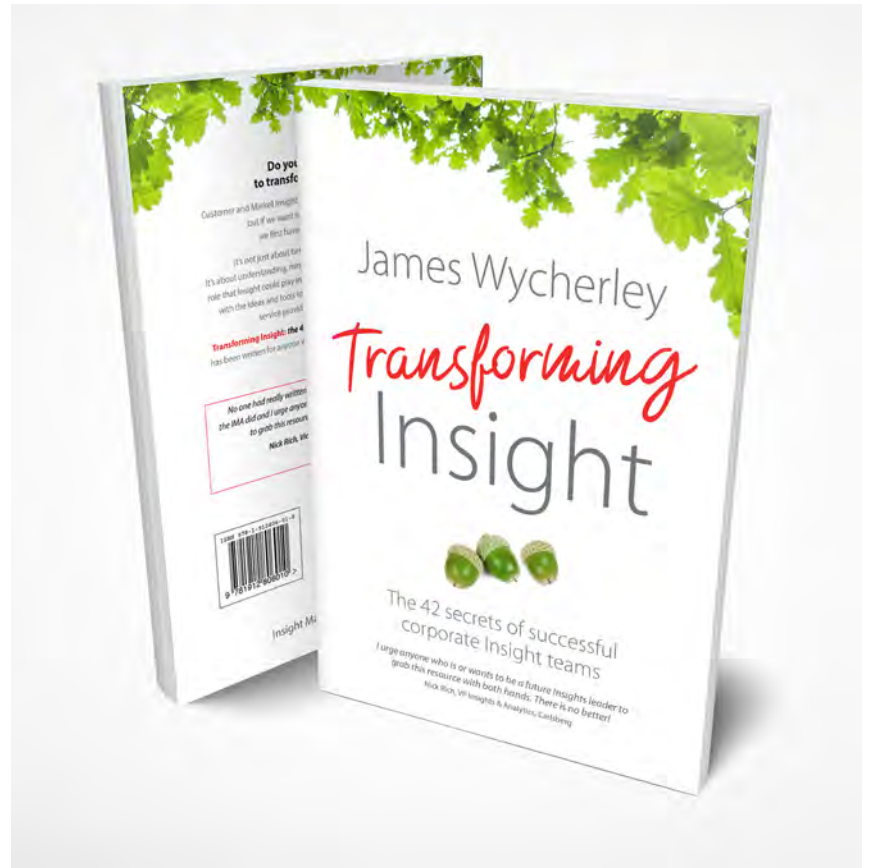Eric Tayce is vice president, innovation solutions at Burke, Inc. He can be reached at eric.tayce@burke.com.

••• artificial intelligence

# Ask the tough questions

How to achieve trusted AI in the media evaluation, CX and social listening industry

| By Rob Key

**abstract**

As their adoption surges across various industries, it's critical to establish frameworks and processes for the safe and effective use of AI technologies. Efforts toward strong data governance, transparency and human oversight to eliminate AI bias and build trust in AI systems are essential for decision-making and compliance with emerging global standards.

The surge in adoption of AI technologies across organizations and geographies has given rise to an equally urgent and concurrent sprint by relevant governing bodies to establish critical frameworks and processes to help ensure their safe and effective use. While positive and important steps in the right direction, these initiatives are admittedly overdue given that AI technologies are not new.

While current concerns about AI are initially focused on areas with privacy-related questions (such as policing, social credit systems, facial recognition and regulated industries), the social, VoC and media intelligence space will not remain immune for long.

While most use cases in the space are currently considered low-risk from a regulatory perspective, there is significant risk to the brand itself in making business decisions based on poor-quality data and analysis.

The core, fundamental goal of regulatory efforts is to eliminate AI bias, increase accuracy and build trust in the systems. This means higher data standards, greater transparency and documentation of AI systems, measurement and auditing of its functions (and model performance) and enabling human oversight and ongoing monitoring. Indeed, even without forced regulation, these processes represent important and critical best practices that warrant immediate adoption. In the near future, it is likely that almost every leading organization will have a form of AI policy in place that will adhere closely to these standards.

Yet these standards represent areas where by and large the vast majority are currently falling dangerously short on technology and process. Poor-quality sentiment and opaque systems, for example, have created skepticism about the resulting data and insights and helped contribute to an overall trust deficit that has stifled some important adoption.

Aligning with these standards will help reverse these perceptions. But this will require all stakeholders to substantially elevate their technology,
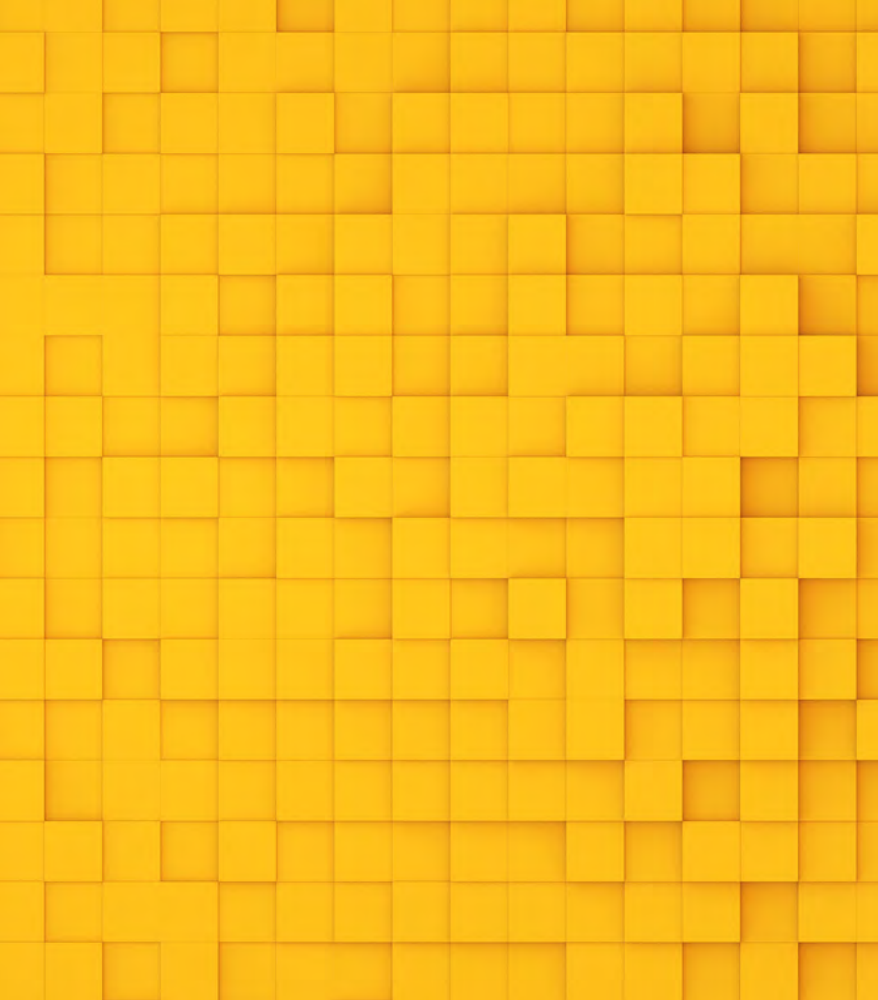
requirements, demands and systems. It's a process that needs to begin now, before these requirements kick in, because doing so will reap clear and immediate benefits. These include mitigated enterprise and consumer risk, alignment with emerging global standards as well as generating substantial improvement in accuracy, adoption and impact.

Perhaps most importantly it will help engender more trust among key stakeholders not just with the AI technology itself but also for all the solutions and products that leverage the technology.

While the U.S. has recently announced agreement on principles among many leading AI organizations for self-regulation, the EU's AI Act is the first major proposed AI law and generally represents an evolved and thoughtful approach. Its principles are representative of effort elsewhere and are likely a harbinger of what's to come globally.

The Act categorizes use cases for AI technology from unacceptable- to high- to low-risk and requires corresponding, specific actions that range from stringent to nominal. High-risk areas include employment, transportation and more. Social and media analysis and market research, depending on how the data is used, is considered largely low-risk at this point. However, this is just a starting point and we believe it's likely that, over time, the standards applied to high-risk today will eventually migrate to other, lower risk use cases.

The crux of the Act requires strong data governance; accurate training; the elimination of potential bias within models; clear and transparent model performance validation; tracking and auditing and the ability for human-in-the-loop intervention if the models go off the rails. Model-training has an important and prominent focus. It states:

"High data quality is essential for the performance of many AI systems, especially when techniques involving the training of models are used, with a view to ensure that the high-risk AI system performs as intended

and safely and it does not become the source of discrimination prohibited by Union law. High-quality training, validation and testing data sets require the implementation of appropriate data governance and management practices. Training, validation and testing data sets should be sufficiently relevant, representative and free of errors and complete in view of the intended purpose of the system…"

The Act notes that taking these steps to build trust in these systems is simply essential. Untrusted AI is doomed to failure.

Let's contrast these standards and requirements with the application of AI to current social, voice-of-customer and media analysis.

While the application of some level of AI is pervasive across most social, media and CX platforms, it is highly uneven. According to the Social Intelligence Lab's 2023 State of Social Listening study, data accuracy remains one of the industry's biggest complaints. In many systems there is negligible human-in-loop oversight or ability to fine-tune or modify models. One-size-fits-all model classification generally takes precedence over more accurate, domain-specific ones.

Model performance and auditing is mostly opaque or one-off – if available at all (in most cases it is not). Further, the training processes and data used are most often black-box and mostly unavailable to users of the technology (eliminating bias in model training can be a complex task that requires sophisticated end-to-end processes).

If asked, most users simply do not know the specific performance of their models and accuracy of their data classification, yet they often make business decisions based on this data. If probed on specifics, many providers of AI gloss over details of capabilities. Unclear marketing, promotional materials and other documentation often just muddy the picture. This state of affairs is simply unsustainable in this new environment.

To their credit, organizations like the Institute of Public Relations, ESOMAR and the Association of Media Evaluators are working to educate and generate some consensus for

action but those efforts remain mostly in the early stage and aspirational. Importantly, an increasing number of analytics- and technology-savvy brands are demanding greater visibility and transparency – features of trusted AI – which is a key impetus for change. Without pressure from buyers, many technology providers simply will not prioritize the development of new key "trusted AI" features.

Here are some key questions and topics we recommend for consideration when evaluating AI vendors, drafting RFPs or participating in relevant industry groups:

- Conduct a current assessment. Does your team understand this technology well enough to effectively evaluate it and establish the right processes? Do you need to improve education, especially among key stakeholders? Are you asking vendors the right questions?
  Who are your current vendors and what is the state and quality of their trusted AI technologies and processes, if any? If none, what is their roadmap? How are your data and insights being used from social and media analysis? How does that align to high- and low-risk categories? Where could the combination of trusted AI and unstructured data provide your organization with even greater value?
  How are models trained? Is it in-house or via a third party? What specific roadmap and strategy do your vendors have to align and elevate their offerings to these standards? Are they capable of working with third-party audit and trusted AI platforms? How do they conform to key trademark and privacy requirements? What is their timeline for action?
  What process is used to eliminate potential bias? Are there robust data discovery capabilities? Is the model training conducted by third parties or domain experts? Are there intercoder reliability processes? How do you ensure the highest data quality? How are models scored and evaluated? Can you access domain- or industry-specific models? And can your team participate in the fine-tuning or are you stuck with a static,

one-size-fits-all model that doesn't meet your requirements?
- How accurate is your model? How can you know and verify this? Can you access and audit the training data models directly and see the precise performance of your model at any point in time? Is the model evaluation process comprehensive? Does it incorporate standard measures (F1, precision and recall) or more? How often is model performance assessed? And is there an available audit trail of the model performance over time? Do you have a data drift detection technology providing you with advance warning that models might need to be retrained and updated? Is model performance tracked and registered or is it "train it and forget it"?
- Is there a model governance system? Can you or your organization provide input or changes to the system? Can you track and see the performance of all your models across the organization in near real time? Is there an end-to-end system to build, fine-tune, integrate, validate and deploy models efficiently? How does it work and how is it accessed? Is there a process for feedback and model optimization?
  Is there a human-in-the-loop capability for oversight and intervention? How does it work? Can you have direct access? And if models do go off course, what processes are in place to help explain why and determine what corrective action to take? For many use cases, the AI Act demands that transparency must be built in so that users can interpret the system's output (and challenge it if necessary).

## Specifics matter

These questions represent only a partial (but important) list of topics requiring critical discovery and areas of investigation that deserve in-depth, detailed responses. When it comes to AI approaches, specifics matter.

The time for this effort is now. Though initial legislation is not focused squarely on this category, the industry should still take aggressive steps to abide by the standards. The growth in importance and impact for insights derived from unstructured data requires

the most trusted AI. And as trust is gained, the insights and solutions will continue to expand across essential areas ranging from corporate sustainability efforts to product innovation, brand reputation and customer experience.

Now is also an ideal time to get involved more with your industry groups for education, consensus development and representing the category in front of key regulators, academics and other influentials.

Moreover, taking specific actions now will not only front-end potential risk and help ensure compliance to internal AI alignment and policies; it will also generate significant positive impact in model effectiveness, leading to broader adoption and even predictive and prescriptive analytics that will better serve your organization and its key stakeholders. Finally, of course, challenging your own internal capabilities and the industry at large is indeed the critical leverage point required to level up capabilities in a manner that safeguards consumers and helps assure trusted implementations of these essential technologies.

Clearly, the payoffs of being a leader – and not a laggard – in trusted AI are simply too important for the industry at large to wait any longer. ⓠ

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# No more haystacks

Have researchers become too good at finding rare-disease patients to interview?

| By Bj Kirschner

| abstract

Bj Kirschner reflects on how the marketing research industry has progressed from studying common health conditions to increasingly rare and specific ones and emphasizes the importance of adapting research methodologies and maintaining sensitivity to patient needs and circumstances.

How many traffic lights does your great-uncle pass if he becomes a tuna? Absurd question, right? But you are curious, I bet.

Actually, in the context of market research, I think we can make sense of it. Let's do what we do best, look more closely and analyze it.

We have a guy (great-uncle) with a startling change to his life (I would call becoming a fish pretty startling, no?) and a question only he can answer (he's the only one passing traffic lights, only he can count them).

Sound familiar? If you have ever done any health care research, it should:

- The great-uncle is a patient.
- Turning into a tuna is the patient's rare condition.
- The number of traffic lights is a question to which only this rare-disease patient could actually know the answer.

In other words, "rare patient" research. See? It's not as absurd as the great-uncle example.

Here's my theory: health care market research is a victim of its own success. We have found the patients, we have found them with rare conditions and we have asked them every question we have. I'm certainly proud of that but it also scares the heck out of me. Don't get me wrong, it's all positive. But each time we push further, future expectations are pushed further and I often wonder if perhaps we are pushing ourselves TOO far. Success comes with responsibility and boundaries.

What will that mean? Let's break the discussion down into three parts – the patient, the micro-condition and the questions – and see where we end up.

## Part 1: The patient

Back in the pre-modern days of market research, "health care" meant PCPs and people who took any prescription medication (the word "therapy" was not in heavy use yet). HIPAA was relatively new; managing it made us all nervous. GDPR did not even exist yet but many countries already had thorny privacy standards we needed to learn. But "knowing" health care was simple by today's standards. It meant understanding your country's national health care system, which HCP treats specific conditions and maybe the basics of a few diseases.

Then we took a leap. Slowly, conditions like diabetes and arthritis crept in. I can remember when we feared recruiting rheumatoid arthritis patients but gleefully took on osteoarthritis patients because they were "easier." It was so obvious to the sponsors of the research but without directly asking, we had respondents we could not use because they were not asked properly. No one's fault; we didn't know what we didn't know. There were times even that question was not on a screener because it was assumed everybody knew the difference, same for a discussion guide based on that assumption.

But we learned as we went along. I know I went from, "It will take max effort to find rheumatoid arthritis patients; can we use osteoarthritis if needed?" to "No problem at all." We found resources, we educated ourselves and we tried to foster full partnerships among all parties in the research.

Then the goalposts started moving. Suddenly it was rheumatoid arthritis patients using a specific therapy, perhaps one relatively new therapy, a much less common therapy or an insanely expensive therapy. And then there was this: "You want us to research WHAT KIND OF PATIENT? Only stress-incontinent patients? Why would anyone agree to discuss something so personal with strangers?" The answer to that came quickly: lots and lots of them. In both cases, once we jumped the first hurdle, these patients became as common to recruit as people who eat cereal for breakfast.

How did we jump the hurdle? We looked at how we had developed what we already had – panels, qual or quant, discussion guides and materials used for very specific non-health care respondents – and adapted them. For instance, recruiters added conditions to their main questionnaire database-gathering. Easy enough. How did we educate ourselves? One example was an aha moment that seems so quaint today: We realized could find patients through their comorbidities. In the mid-1990s, HIV/AIDS was "newish" to research. An added challenge was patients even admitting they had the virus because of the stigmas. Once we learned that many with HIV/AIDS also had hepatitis C, we found one more path to the patients. We had done research with hep C patients but if HIV/AIDS was not part of the discussion we didn't know if they had the virus or not. Not only did we find more patients but we found them to be quite open to HIV/AIDS research as they had to been to hep C.

Up next, we went from leaps and hurdles to the long jump. Now came cancer, multiple sclerosis, leukemia and others. I am not meaning to minimize arthritis by saying that. Everyone's conditions are of vital importance them. We only live in our own bodies. But there are differences in how research is done with what we first called "hard patients." It was next-level!

Cancer did not stay cancer for long. It was separated out into breast cancer, non-small cell lung cancer, prostate cancer, colorectal cancer and so many others. Then it was stages of cancer.

But two very important changes came of this leap.

- The first was a top-to-bottom, full-industry rethink. Moderators, agencies and the like had to become experts in specific conditions to speak to patients intelligently and thoughtfully. Over at the pharma companies there was a shift to a more fearless approach to market research that pushed boundaries beyond imagination. Again, not bad, just unexpected.

• The second happened on the recruiting side. How do we find these patients? Specialty recruiters and referrals were early innovations. More than anything was the seismic shift on which the whole industry agreed: Caregivers are valuable too. Not just "too" but often more valuable. Now we could reach audiences like pediatric patients, neurological patients and late-stage oncology patients by speaking to their caregivers, people who often know more about the daily issues their loved ones encounter. They often have a more rounded perspective, so we happily spoke to them.

The progression is clear. Every time we made the impossible possible, a new wave of impossibility followed. And then the long jump became a full-on decathlon.

## Part 2: The micro-condition

As I write this in mid-2023, I have had 17 projects this year where we were speaking to patients with conditions only maybe 100,000-500,000 people have worldwide. That's not rare, that's not even super rare, that's incomprehensively rare. Can we even give them a 30-minute questionnaire? We can make assumptions based on similar patients but the answer will only arrive when we attempt it. Now we have moved away from using what we have learned over time to learning it on the fly with the rarest patients we will ever encounter.

But that's only half of it. Let's revisit our cancer patients. They were segmented by cancer type when we last discussed them. But now they were segmented by type, then therapy, then length of diagnosis, then specific experiences and on and on from there. Oh, but don't forget the demographics. We also need them to be of a specific age or ethnicity or use a certain insurance (at least in the U.S.). The screeners and guides each stretched to hundreds of pages. I kept asking questions like this: "If there are only 17 people in France on this therapy, does age actually define them and thus have to be on the screener?"

If there is a development reason that only these 17 people can be on this therapy, age is suddenly as important

to know ahead of time as being on the therapy.

If we are asking age because market research has been asking age since we first asked cavemen what they thought of the wheel, we can safely break the habit for this screener without any ill effect on the research.

If we are asking age in screening because it might be interesting to see how these 17 people might be thinking because they are different ages, it's not a definer. It's perfect for a qual interview but it does not actually affect the research. Put it in the discussion guide, not the screener.

If there are only 17 people on a therapy in France, we are beyond fortunate to find any of them; we should all be thrilled with that result.

We found the patients and we have found them with very rare conditions. That much makes our entire industry the envy of all others.

## Part 3: The questions

Now we come to what we actually want FROM the respondents. That will be different for every study, as is should be. But based on the path we took from the first arthritis patient research to the cancer study with only 17 people on treatment in France, we can at least set up guidelines that in total will keep us on that path of forever learning and adapting.

Following are some suggestions and requests from clients, recruits and even respondents. If you are in any of those groups, and we all are, call me, e-mail me or send me a carrier pigeon so I can add your suggestions to this list.

• Remember that every respondent needs to be qualified, reachable, available and interested.
• Try to anticipate patient needs. We all have conditions, how do they affect us? When we look at very small populations of rare patients, we need to consider this far more than usual. For example, Alzheimer's patients. Even with a mild diagnosis, what could be the pitfalls? They are able to function and be aware. In theory, at least. They may perfectly match OUR standards but if THEY have their own standards, self-perception wins.
• Be sensitive to timing. The truth is that the ideal time for the respondent is when the interview should

happen. It may be ideal for the interview to happen immediately following an infusion visit, for example. That may not be possible, even with the best of intentions. Or the respondent may have a job that does not allow for a midday interview. How can we find a way to put the respondents first and still get amazing results? We need to adapt.

• Again, stop and self-check. Is what we are discussing vital to the respondents? Years and years ago I received a furious call from a massive international cancer support group. They were outraged that we dared to ask stage 4 cancer patient about advertising, arguing that many of the patients may not live to be affected by it. Hey, ad testing is part of our business, it's very important to our end clients. But the advocate wasn't wrong. We can work around and satisfy both sides. I promise!
• Not everyone wants to do market research. It's not an incentive issue, it's not a scheduling issue, it's a personal issue. They may simply not be up to it. Or just not like the idea of it. The universe of possible respondents is never the number of people with a condition. Even if you are doing a quant study of 10,000, that will never be the universe.
• Impressive recruiting methods do not always reach everyone. They are amazing and I am constantly thrilled seeing the passion we all have for perfection. But there are aspects out of our control no matter how hard we try. What if you post an ad in an online support group and 50 people who would definitely qualify simply do not visit the site during the recruiting period?
• This one is going to be unpopular, so I'm tossing it out there and ducking for cover: with rare diseases, throw out the concept of incidence. Qual or quant, it has no accuracy. It's a plain fact, albeit one a lot of people are uncomfortable discussing. We are not speaking to people who wear a certain brand of footwear. Incidence matters there. The population is so enormous, reality can equal prediction. But what is a 40% incidence among rare patients? How could any of us know? Is it based on the number of prescriptions a physician

writes? That's a measure of physician behavior, not patient behavior. Is it based on information from advocates or support groups? Maybe, but like HCPs, they only have access to people with whom they interact. If the medical community cannot say for sure how many patients have a rare disease, we don't even have a universe amount, the most basic number that goes into incidence.

- "Best effort" is best effort. This is not only a recruiting issue; it may also be a timing issue for moderators. It may be the end clients are not able to provide a list as they hoped or be stuck with a schedule even they hate.
- Always keep learning. I may be overzealous but the first time I see a condition, I dive into an investigation. At our firm, we consider that a part of the job. If you want to take a few hours to even learn the basics of a condition, go for it. This has always been my methodology anyway. Feasibility and honesty depend on facts; learn as many as you can.
- Partnership is key. Everyone involved in making a project happen, end

clients to respondents, is an expert in their sphere. Put them all together and the chances of success are greater.

- Don't say "no" without "but." Possible solutions are key. They may not work but offering shows dedication and thought. When discussing caveats and feasibility that my clients do not necessarily want to hear, I always say, "Nothing would give me more pleasure than being wrong but let's prepare for the worst."

## More than we need?

My original theory offered at the beginning of this piece was that we are victims of our own success in rare-disease work. It can now be posed as a question with a specificity that this whole industry loves: Based on the path we continue to travel together, are we so good that we're getting to a point of deep digging that is more than we need?

Not a judgement, just an honest question we can ask ourselves every so often as we learn and learn and learn

about our place in rare-disease market research.

By the way, I looked it up and it seems there are no recorded cases of people becoming fish or of fish counting traffic lights. But should either change, marketing research will be the first to know! ⓞ

Bj Kirschner is director, business development at Just Worldwide. He can be reached at bj@just-worldwide.com.

●●● special advertising section

# 23 TOP ONLINE RESEARCH COMPANIES

Online research is a broad, diverse and flexible area of research. The companies in this field have access to custom technologies and methodologies that can provide valuable, high-quality and cost-effective results for your marketing research project.

Online research experts can offer facial-coding technologies, niche data, proprietary platforms or online communities. Whether you're looking for B2B insights, customer research strategies, qualitative or quantitative methodologies or data collection and analysis methods, these companies have you covered.

## Civicom Marketing Research Services

Founded 2000 l 500+ worldwide employees
Annie McDannald, Global Vice President, Marketing Research Services



Civicom CyberFacility® for IDIs and focus groups delivers secure web rooms hosted in our private cloud and integrates our proprietary global audio conferencing technology. Features include built-in polling, surveys, dynamic presentation capabilities for showcasing stimuli or message testing, data anonymization options and chat capabilities where interviewers can talk with client observers or respondents privately. Trust your online IDIs and focus groups to Civicom® Marketing Research Services, the global leader with over 20 years of experience in providing ResTech solutions combined with client service excellence. Your project success is our No. 1 priority.

**E-mail inquire@CivicomMRS.com**
**Phone 1-203-413-2423**
**www.CivicomMRS.com**

## Eleven Market Research, LLC

Founded 2021 | 7 employees
Brandon Johnson, CEO

ElevenMR is a global market research company and the only data collection partner you need. We are a unique mix of market research experts with over 20 years of experience. Whatever your consumer, B2B or health care research objectives are, we can help with your quantitative project needs. Not only do we vet and partner with the universe of online panels, but we also offer a custom-dialed phone methodology for lower-incidence or specialty B2B audiences. We also provide unparalleled full-service project management including consulting, screener and survey review, programming and coding/tabulations. Let us show you what we can do! E-mail us at bids@elevenmr.com.
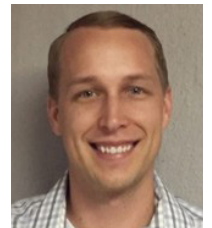
**www.elevenmr.com**

## EthOS

Founded 2009
Paul Chesterman, Partner

EthOS is an innovative qualitative research platform that's revolutionizing the way companies understand customers and their experiences. We empower research teams with advanced tools to capture omnichannel touchpoints, providing real-time insights into ever-changing needs, attitudes and behaviors. Immerse yourself in the lives of your customers through in-the-moment videos, pictures and screen recordings, then leverage AI to unearth rich, real-world insights. You have the flexibility to recruit from your own networks or our extensive participant pool, ensuring you pinpoint your exact target audience. Boost your customer empathy and qualitative research efficiency with EthOS.

**Phone 1-832-356-6010**
**www.EthOSapp.com**

# Fieldwork

Founded 1980 | 400 employees
Steve Raebel, President

Five reasons to choose Fieldwork for your online research! Let us support you! We know what you need. 1. Social prowess: We know how to find exactly who you want to hear from. 2. Our focus is recruiting low-incidence specialists. Over 1 million nationally dispersed respondents. 3. Tailored solutions: We embrace your unique requirements and provide personalized solutions. 4. Local and national reach: Our social prowess and diverse and vast collection of databases opens doors to the world. 5. Global expertise: Explore opportunities with our international recruitment capabilities, vetted and trusted recruiting partners in 50 countries with integrity and high standards of ethics. Focus on the research. We'll do the rest!

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

# FlavorWiki

Founded 2017 | 60 employees
Daniel D. Protz, CEO

FlavorWiki is a leading product and consumer experience platform revolutionizing digital research for food and ingredient companies worldwide. With over 100 million data points processed every year and a global community of testers of more than 1 million real consumers, FlavorWiki empowers innovation teams globally by providing fast, cost-effective and actionable insights. The FlavorWiki platform is an intuitive and easy-to-use tool that can collect, aggregate and analyze hedonic and sensory data with the use of proprietary AI and machine learning. Consumer insights, R&D, marketing and sales teams can leverage the FlavorWiki technology by centralizing all their research data needs in a single place for more agile and accurate decision-making. Integrating video and photo capture features, data validation and powerful statistical tools, the FlavorWiki platform is the perfect all-in-one software solution to drive product innovation and consumer satisfaction.

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

# Fuel Cycle

Founded 2007 | 125 employees
Eran Gilad, CEO

Fuel Cycle unleashes the power of decision intelligence for legendary brands. We achieve this by enabling brands to rapidly capture and act on the mission-critical insights required to launch new products, acquire customers and gain market share. Our technology enables decision makers to maintain constant connections with their customers, prospects and users to uncover real-world actionable intelligence and insights. By integrating human insight with critical business data and through automated quantitative and qualitative research solutions, the Fuel Cycle Research Engine powers product innovation, brand evolution and enhanced user experience.

**1-323-556-5400**
**www.fuelcycle.com**

# Full Circle Research

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

Named the 2021 Panel Company of the Year by The Marketing Research and Insight Excellence Awards (powered by Quirk's), certified to ISO since 2014, GDPR-compliant and co-founder of the global ISO awareness campaign #QualityForAll, Full Circle leads the industry in online sample quality. The company's award-winning survey experience, HoNoR®, marries advanced tech, flexible community strategies and industry-leading quality controls to deliver immediate access to proven-purest data, whether via its vibrant panel of millions or InstaConnect®, its premium programmatic solution that captures hardest-to-reach audiences. A staple on Inc. 5000 (2017-2023) and one of the highest-scoring businesses on Inc.'s 2022 Best Workplaces, Full Circle's foresight and agility result from a consultative approach delivered by diverse industry veterans.

**Phone 1-301-762-1972**
**iLoveFullCircle.com**

## Global Survey

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

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

**Phone +91-740322 0322**
**www.globalsurvey.gs**



## Harmon Research

Founded 2009 | 127 employees
Stephanie Vincent, Executive Vice President

Harmon Research is an insights research company that specializes in data collection. We conduct international studies across more than 43 countries, we have conducted hundreds of studies that spanned a minimum of 10 countries, showcasing our global reach and expertise. We provide our clients with a proprietary panel that goes through constant quality-control checks. We take pride in our robust quality assurance program, DataDefense, which reviews our data before, during and after the survey. Our surveys have numerous safeguards, such as cut-and-paste blocking, IP geo-check and open-end review, to ensure the highest-quality data. Harmon Research's strength lies in our skills and service. Our dedicated account management team is always available to answer questions and sharpen the scope of our research and our team of experienced researchers produce swift and cost-effective results.

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



## InnovateMR

Founded 2014 | 250+ employees
Lisa Wilding-Brown, CEO

InnovateMR is a full-service sampling and ResTech company that delivers faster, quality insights from business and consumer audiences utilizing cutting-edge technologies to support agile research.
As industry pioneers, InnovateMR provides world-class end-to-end survey programming, targeted international sampling, a highly engaged and résumé-verified B2B community for qualitative research through Ivy Exec, quantitative insights and customized consultation services to support informed, data-driven strategies and identify growth opportunities. Known for their celebrated status in customer service and results, InnovateMR combines boutique-level service with extensive global reach to achieve partner success.

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

## Ironwood Insights Group, LLC

Founded 2017 | 300 employees
Brian Cash, VP Research Services

Ironwood Insights Group is an industry leader in online and multimodal (online + telephone) research. Our team of seasoned consultants and program managers offer clients a range of advisory services for each stage of their online research projects: sample design and management, survey design, data collection and analysis. With the recent introduction of IRONWOOD ONLINE, we also offer an agile technology platform that aggregates samples from leading access panels quickly and seamlessly. IRONWOOD ONLINE creates cost-effective, "best-in-breed" online samples that are more comprehensive, finely tuned and provide higher quality. And in real time, we employ AI technology and rigorous project management protocols to authenticate respondents and ensure the quality of survey responses...higher-quality data ensures greater reliability of results! Contact us to learn more about how the synergy of Ironwood's online capabilities provides clients with a clear competitive advantage for even the most complex online research challenges.

E-mail info@ironwoodinsights.com
Phone 1-602-661-0878 x2110
www.ironwoodinsights.com



## Just The Facts Inc.

Founded 1994
Bruce Tincknell, Managing Director



Quality research at budget-friendly costs! For 30+ years clients have rated JTF's ONLINE RESEARCH as the No. 1 in cutting-edge tools providing rich insights. Our online research methods use an array of techniques to better assess a product/service's hidden advantages. It's used in both B2C and B2B environments to uncover customers' motivating actions, behaviors and decision-making. Our tool kit uses an array of tech-savvy online techniques providing the most robust insights. JTF is your "go-to partner" for high-quality online methods. Your research investment leads to optimal business strategies, achieving stronger sales, profits and ROI. Let's discuss your specific needs, ensuring your initiatives are aligned with customer expectations! WE LISTEN TO YOU! Call today for a no-obligation consultation or e-mail info@jtfacts.com. Testimonials: www.justthefacts.com/testimonials-x-30.

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



## L&E Research

Founded 1984 | 250 employees
Brett Watkins, CEO



L&E Research provides nationwide recruiting, advanced technology and industry-leading client service to unlock powerful business insights. That's why L&E Research is 99% client recommended. True insight is the result of asking the right questions with the right people. On-site, off-site or online...we utilize the best talent and technology to make the best connections with our clients, and our community, to deliver proven superior qualitative research. As experts in qualitative research recruitment, we know that finding the right people to talk to is key to a successful project. L&E Research recruits the best respondents and provides a safe and confidential environment to enable a valuable exchange. Contact us today to learn about our qualitative and quantitative recruiting capabilities.

E-mail bidrequest@leresearch.com
Phone 1-877-344-1574
www.leresearch.com

## Market Xcel

Founded 2000 | 600 employees
Jaceey Sebastian, VP of Client Development,
Market Xcel, USA

Market Xcel – Where insights meet excellence! Empowering over 700 clients worldwide, we own and manage top-quality online and mobile panels drawing from 28 million+ highly profiled respondents across 80+ countries. Our services include full-service solutions featuring survey scripting, data collection and processing, along with tailored sample-only services. We uphold rigorous data security standards, adhering to ESOMAR, GDPR and localized protocols. We provide 24/7/365 bidding and panel management support, delivering 11K daily completions. Our panellists undergo double opt-in verification and are sourced from a wide range of web channels like websites, social influencers, web apps and online campaigns. For all your online research requirements, reach out to us at jaceey.sebastian@market-xcel.com.

**Phone 1-718-902-6016**
**us.market-xcel.com**



## Murray Hill National

Founded 2013 | 35 employees
Susan Owens, COO



Clients trust Murray Hill National with thousands of studies per year as their research partner. In return, we deliver valuable solutions and high-quality recruitment and data collection for their consumer, health care, business-to-business and technology projects. Specializing in all methodologies and audiences, we have the ability to host and deliver your results across the U.S. For the last 25 years, the executives at Murray Hill National LLP have worked diligently and advanced to one of the leading data collection and recruitment companies in the U.S. Our teams are committed to meeting your research needs. We provide high-quality recruitment with access to 3.5 million consumers, 500,000+ B2B executives/professionals, 500,000 physicians, nurses and more, and we organize 100+ patient panels. Our qualitative services extend far beyond the traditional focus group. Our services include online, digital, remote, home use tests and any other methodology needing to find an audience with feedback or expert knowledge. Call us today for your next project, your "national" recruiting experts!

**Phone 1-972-707-7645**
**www.murrayhillnational.com**



## OvationMR

Founded 2017 | 20+ employees
Jim Whaley, CEO



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

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

## Precision Opinion

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

For nearly 20 years Precision Opinion has provided its clientele with boutique data collection and consulting services. With a rich history in online methodologies, programming, fielding, sample procurement, custom proprietary panel development and multimodal research, Precision has the experience to solve your greatest research challenges. Additionally, we offer 600 in-person CATI interviewing stations, SMS text-to-web, mail-to-web, IVR and analytics. Since 2022, the new executive leadership team has built upon our quality tradition, reinvented our corporate culture and reaffirmed our commitment to our clients and employees. Clients have called us the most trusted name in data collection, but it's our job to remain unbiased.

**Phone 1-702-286-7700**
**www.PrecisionOpinion.com**

## Recollective

Founded 2011 | 100 employees
Alfred Jay, CEO

Recollective created the industry's best qualitative research platform to help researchers bring brands and customers together to win as one. With the most flexible and complete set of tools at their fingertips, researchers can easily bring any methodology to life and get projects into field faster than ever before. Recollective's platform facilitates the entire online research process, including participant screening and onboarding, qualitative and quantitative activity-based research, socialization, analysis and reporting. For over a decade, market research agencies and brands across the globe discover how to research happy with Recollective.

**Phone 1-613-230-3808 x237**
**www.recollective.com**

## Recruit and Field Inc.

Founded 2009 | 32 employees
Josh Dyszel, CEO
Kristin Ameruoso, Vice President of Qualitative Research

We've got your back! Everything we do at Recruit and Field (R+F) ensures that you (agency and market research users) can confidently deliver quality results that meet the project's insights objectives. What sets R+F apart is our team's creativity and agility; the ability to analyze each project, identify and communicate barriers to success and react quickly to changing needs. From your initial briefing call, real-time, reliable and dependable communications with clients are the basis for all our services. We welcome inquiries and bids (bids@recruitandfield.com) for consumer, B2B and health care projects. R+F is a nationwide qualitative recruiter comfortable and creative in using traditional and digital methods.

**Phone 1-646-400-5650**
**www.RecruitAndField.com**

## Second To None

Founded 1989 | 65 employees
Jeff Hall, CEO

Second To None is a leading customer experience research agency, specializing in omnichannel mystery shopping, online research, voice-of-customer surveys and sales/marketing compliance audits for consumer-facing brands across North America. We help multi-location companies deliver consistent, intentional and authentic customer experiences. Full-service solutions include program design, data collection and analytics, grounded in solid statistical science and strategic relevance. Brand leaders leverage our assessments of operational standards through mystery shopping and online research initiatives for true competitive advantage. Our nimble, custom solutions deliver real-time insights, enabling you to take action, affect positive change and drive improved business performance.

**Phone 1-734-302-8400**
**www.stn.com**

## Skopos World

Founded 1995 | 125+ employees
Darren Mark Noyce, Founding Father

Skopos World is the long-established, award-winning, global insights group (Europe, China and across the planet). We deliver research skills and expertise to help clients maximize opportunities originating from "new world" developments. Our modern qual/quant research tool kit fuses intellect with insight and local knowledge. We deliver the scope and scale – combined with the right attitude and agility – today's brands need. Our experts ensure the work is trusted and actioned. Skopos pioneered online/digital research in the 1990s, building the first internet panel (OpinionPeople™) in Europe; and since launched the leading-edge community platform (Spasys™); introduced Deepr™ for Qual-At-Scale™; and trail-blazed mobile studies and digital UX. Throughout, we have NEVER lost our can-do attitude. Darren Mark Noyce, founder and fellow of the MRS/CIM/RSS (ex-Harris Interactive director (Europe/NYC)), often contributes to industry conferences/articles/books around the world.

**Phone +44 (0) 207-953-8359**
**www.Skopos.World**

## Symmetric, A Decision Analyst Company

Founded 2016 | 150 employees
Jason Thomas, CEO of Symmetric

Symmetric owns and operates American Consumer Opinion®, a worldwide online panel that reaches over 7 million consumers in 200-plus countries, spanning North America, Latin America, Europe and Asia. Consumers can sign up to become members in one of 11 languages and complete demographic profiles are maintained for each household. Symmetric also operates five B2B worldwide online panels: Physicians Advisory Council®, Medical Advisory Board®, Executive Advisory Board®, Contractor Advisory Board® and Technology Advisory Board®. Symmetric places a high value on representative samples, scientific sampling methods and advanced fraud-detection systems. Our online panels are carefully balanced, continually refreshed and systematically cleaned. Non-responders, speedsters and cheaters are continually purged. Symmetric provides sample for quantitative and qualitative research (focus groups, depths interviews and ethnographies). Additional services include programming, hosting, online communities, tabulation, coding and IHUT mailing.

**Phone 1-817-649-5243**
**www.symmetricsampling.com/panels**

# QUIRK'S TIME CAPSULE

Facts and findings from nearly 40 years of Quirk's

## Early online focus group caveats still resonate

In his May 1995 article "Focus groups on the internet: an interesting idea but not a good one," veteran moderator and frequent Quirk's author Thomas Greenbaum made a number of good points that, far from being the defensive carping of a traditionalist in the face of a technology that treatens his livelihood, are still relevant today. First, he cited the loss of some of the group dynamics that are inherent to gathering people in a room for a conversation. Second, the difficulties related to recruiting online respondents, who may find it easier to fake or misrepresent their identity. Third, related to the first point, not being physically in the same space with the respondents detracts from the skilled moderator's ability to read the room and pick up on cues that could alter the path of the discussion. Fourth, Greenbaum argued that respondents, freed from the duty and the scrutiny of sitting in a room with the moderator, could be easily distracted and be doing other things like listening to music or watching TV. While his other assertion that the current state of online video technology wasn't good enough for effectively showing packaging mockups or TV ads is now moot, everything he mentioned is still likely top-of-mind for online qual practitioners nearly three decades later.

With so much recent talk about generative AI and other forms of AI we thought it might be fun to look back at a few examples of how we covered some then-new technologies and their potential use for marketing research.

## The few, the rich, the online

Our early articles on conducting research online frequently mentioned the need to consider that not everyone has access to the internet. From 1998:

*"An internal corporate survey may or may not be appropriate to place on the Web, depending both on the company and the employees being surveyed. Boeing Company, for example, has used the internet for surveys designed for managers and professional workers who are provided with computers and internet accounts by the company, but when surveying factory-floor employees who may not have the access and equipment, the more traditional pencil-and-paper methodology prevails."*

Another piece cited an early 1996 report: *"Twenty percent of the American workforce and 5 percent of U.S. households say they currently have access to the Web...For the most part, these users represent the small (10 percent) but influential, highly-educated, high income, 'early adopter' segment of the population."*

According to Statista, current U.S. internet penetration is 91.8 percent. My, how things have changed.

## Make sure it's optimized for Netscape

A June/July 1997 article from James Watt ("Using the internet for quantitative survey research") made strong arguments for the benefits of moving beyond mailed questionnaires: speed; cost (no more printing; no more postage!); ease of making changes on the fly rather than having to reprint and re-send); and the ability to spruce up the look of the surveys. *"Internet questionnaires delivered with the Web have some unique advantages. They can be made visually pleasing with attractive fonts and graphics. The graphical and hypertext features of the Web can be used to present products for reaction or to explain service offerings. For respondents with current versions of Netscape or Internet Explorer, the two most popular Web browsers, audio and video can be added to the questionnaire."*

*Scan to access all Quirk's back issues.*

# CALENDAR OF EVENTS

••• can't-miss activities

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

**Strategy Institute** will host the Annual Big Data and Analytics West Summit on **November 14-15** in **Vancouver**. Visit bigdatasummitwest.com.

**Momentum ITSMA** will host Marketing Vision on **November 13-15**. Visit momentumitsma.com/marketingvision.

**Market Research Society** will host the Financial Services Research Conference on **November 16**. Visit www.mrs.org.uk/event/conferences/financial-services-research-conference-2023.

**Advertising Research Foundatio**n will host Attribution & Analytics Accelerator on **November 14-17**. Visit thearf.org/event/attribution-analytics-accelerator-2023.

**Insights Career Network** will host the Job Seekers & Allies Meetup: ICN Speed Networking on **November 20**. Visit www.insightscareernetwork.org.

**ASC** will host the ASC Conference – Generation Survey on **November 22**. Visit ascconference.org/events/asc-conference-generation-survey.

**IQPC** will host Customer Experience Asia Week on **November 20-23**. Visit www.cxnetwork.com/events-customerexperienceasia.

M**arket Research Society** will host the Agency Owners and Leaders Conference on **November 23**. Visit www.mrs.org.uk/event/conferences/agency-owners-and-leaders.

**We.CONECT** Global Leaders Gmbh will host Pharma Cimicom on **November 26-28** in **Berlin**. Visit www.pharma-competitive-intelligence.com.

**Corinium Global Intelligence** will host CDAO Nordics on **November 27-28** in **Stockholm**. Visit cdao-nordics.coriniumintelligence.com/2023.

**NMSBA** will host The Shopper Brain Conference on **November 29-30** in **Singapore**. Visit www.nmsba.com/conferences/shopper-brain-conferences.

**Corinium Global Intelligence** will host CDAO Calgary on **November 30-December 1**. Visit cdao-calgary.coriniumintelligence.com.

**TTRA** will host the Asia Pacific Annual Chapter Conference on **December 1-4** in **Seoul**. Visit ttra.com/asia-pacific-chapter/2023-conference.

**Market Research Society** will host the MRS Awards on **December 4**. Visit www.mrs.org.uk/awards/mrs-awards.

**Insights Career Network** will host the Job Seekers & Allies Meetup: Building Awareness and Crafting Conversations on **December 4**. Visit www.insightscareernetwork.org.

**IQPC** will host the CX U.K. Exchange on **December 4-5** in **London**. Visit www.cxnetwork.com/events-customer-experience-exchange-uk.

**Corinium Global Intelligence** will host CDAO APEX West on **December 5-6**. Visit cdao-apex-west.coriniumintelligence.com.

**IQPC** will host the CX Healthcare Exchange on **December 5-6**. Visit www.cxnetwork.com/events-customer-experience-exchange-for-healthcare-usa.

**Strategy Institute** will host the Annual Data Analytics for Health Care Summit on **December 6-7** in **Toronto**. Visit www.healthdatasummit.ca.

**Quirk's Media** will host Wisdom Wednesday on **December 13**. Visit www.quirks.com/events/wisdom-wednesday-webinars-december-13-2023.

**Mystery Shopping Providers Association** will host the MSPA Hub on **December 15**. Visit mspa-ea.org/en_GB/events/eventitem/26-the-mspa-hub-virtual-event.html.

*Event details as of October 2, 2023. Please see websites for more details.*

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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 com-

plete list of upcoming events visit

www.quirks.com/events.

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www.telepoll.net

# 10 minutes with...

## Marat Fleytlikh

*Associate Director, Consumer Insights – Agile Disruptive Innovation Kraft Heinz*

### What is the role of mutuality in marketing research, specifically on the client-side?

I live by the mantra "we are all in it together," because if one of us fails, we all fail as a team. At its core, mutuality recognizes that both parties share the benefit and burden of that said activity. It's definitely not a transactional connection, as both parties are fully engaged and strive for the success of one another.

When commissioning new projects, I prefer to reach out to partners who embody the same mentality. This allows the relationship to thrive beyond vendor/client to a true partnership where we keep each other accountable and focused on the ultimate outcome. From my vantage point, this involves solid onboarding, unpacking key questions, defining success and collaborating during the reporting phases to yield stronger and more actionable deliverables.

### Do you have any tips for research and insights teams that struggle to communicate findings across their organization?

Reach and engagement are significant obstacles when teams are looking to share findings more broadly. It's common to see pushback through questions like: Why should I care? Are the results actionable? Can you just send the findings via e-mail? I think it's imperative to drive excitement within the org and showcase the impact of the work to enable reach. Fine-tune your output to be concise, interesting and actionable. Look for different ways of showcasing the work – panel discussion, trivia, workshop, etc. – which will make the findings more relatable and shareable. Additionally, tap internal sponsors who can help generate the excitement for the session and drive overall participation.

### What methodologies or new tools do you hope to utilize in 2024?

I'm looking to incorporate augmented reality in packaging or concept assessment. Since time is rarely on our side, I'm investigating how 3D renders can be created and quickly modified for testing and re-testing. This would allow for quicker concept refinement and decrease time to develop MVPs (minimum viable products).

*Marat Fleytlikh*

> *"I think it's imperative to drive excitement within the org and showcase the impact of the work to enable reach. Fine-tune your output to be concise, interesting and actionable."*

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