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Quirk's Marketing Research Review

MARCH/APRIL 2024

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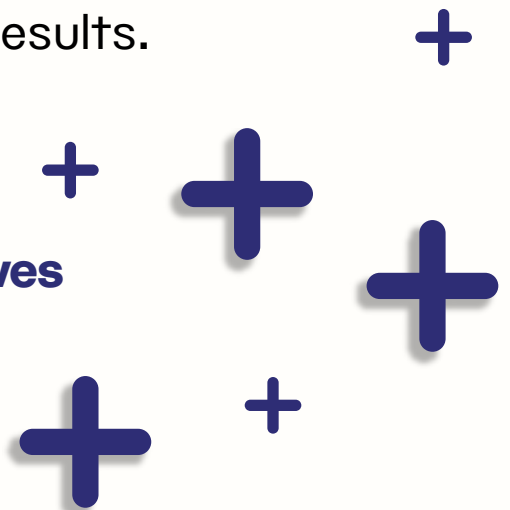
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// Noted Posts

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Championing equality through marketing research: Plan International's campaign for girls' empowerment

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

The researcher's almanac: Understanding brand tracking and key consideration

<https://bit.ly/49jd8HD>

Voice of the customer: Five tips for an effective VOC program

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

Research Industry Voices

The myths of customer experience innovation

<https://bit.ly/47ZYh3U>

User experience research: The top trends and best practices

<https://bit.ly/3UsA0Fc>

Product discovery: What it is and best practices

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

Research Careers Blog

Working from home overpowers coworking spaces

<https://bit.ly/42s3h04>

How to encourage employees to share ideas at work

<https://bit.ly/3tqRL7D>

How active listening can help fight employee burnout

<https://bit.ly/3ZPsr7m>

// E-newsworthy

How to make 2024 the year you clean up your organization's data emissions

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In Case You Missed It

news and notes on marketing and research



... alcoholic beverage research

A (plastic) jug of wine – and thou?

In an effort to find more carbon-neutral wine packaging, researchers in Australia surveyed 1,200 consumers and found some interest in alternatives to the beloved glass bottle but conclude that non-glass options lack the sense of “heritage and luxury” that bottles confer.

For the article, “Measuring the effect of product and environmental messaging attributes on alternative wine packaging choices” in the *Journal of Cleaner Production*, researchers from the University of South Australia’s Ehrenberg-Bass Institute for Marketing Science and the University of Adelaide’s Business School explored how attributes such as price, brand and messaging influence packaging choices.

Australia’s main alternative wine packaging choices are the “bag-in-box” (i.e., cask wine) and aluminum cans, along with newer formats such as flat plastic wine bottles.

While these alternatives are up to 51% more carbon-efficient than glass, Australian consumers are resistant. Casks and flat plastic bottles were the most preferred formats after traditional glass, with cans the least preferred, as they were closely tied to specific occasions, such as drinking outdoors.

Package format was the biggest influence on people’s choices; price came second. The importance of brand and eco-messaging varied depending on the respondent’s age and how many eco-friendly behaviors they claimed to engage in.

Alternative wine formats were also typically bought more by younger people. Consumers were more likely to choose alternative wine packaging when the product is in a mid-to-low price range and if it comes from a well-known, prestigious brand.



... new product research

Conflict over innovative ideas can be positive

Assessments of novel ideas can vary because evaluators use fewer common reference points to evaluate them, making judgements more reliant on idiosyncratic knowledge and preferences, according to a recent study.

For his article, “Greater variability in judgements of the value of novel ideas,” published in the journal *Nature Human Behaviour*, co-author Wayne Johnson, a postdoctoral researcher at University of Utah, found that the greater an idea’s novelty, the greater disparity in responses it generates.

These conflicting evaluations result in missed opportunities because the wide range of opinions is seen as a negative signal, rather than evidence that the idea is new and useful.

Johnson argues decision makers should identify the reference points different evaluators are using and focus on using evaluations with the most relevant, valid reference points. This strategy can create order from the confusion of many conflicting evaluations and make innovation opportunities clearer to see.

“People interpret disagreement as risk. The fact that disagreement increases with greater idea newness makes creative ideas seem less valuable,” Johnson says. “That throws sand in the gears of innovation.”

Instead of giving up or making negative conclusions when we see disagreement, he advises recognizing this could indicate creativity and prioritizing reviews that use the most relevant reference points.

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The value of being there

It's only been four years but in some ways it feels like a lifetime ago. Our March 2020 Quirk's Event in Brooklyn was the last large-scale gathering in the marketing research industry before COVID-19 forced everyone to isolate. I remember the nervous energy among all of us there, wondering how real the threat of a pandemic was, joking about bumping elbows together in lieu of handshakes, many of us praying it would all blow over after a while.

How wrong we were! For insights workers, the use of in-person research cratered and we all embraced any and every digital tool for meeting and gathering in order to keep doing our jobs.

Thankfully, most aspects of our lives have returned to some sense of normalcy. Conducting in-person research, for example, no longer means risking one's life. But as our cover story in this issue shows, echoes of the pandemic persist.

The ability to work remotely was essential while COVID-19 was rampant and so many companies and employees found value in it that working from home has both reshaped the commercial office space industry and changed the way people view what it means to commute to their jobs.

For some, remote work has ended up feeling too remote. In their article "Out in the cold," authors Florian Groth and Rieke Burfeind chronicle their conversations with 14 fellow vendor-side qualitative researchers between the ages of 20 and 35 about how working from home has negatively impacted their

careers and, in some cases, even caused them to consider leaving marketing research altogether.

Missing out on the in-office experience, these researchers say, has stifled their ability to learn and grow and kept them in a kind of digital dungeon where the coveted in-person qualitative work goes to senior researchers while they are stuck with run-of-the-mill online-based qual tasks.

There's no mention of whether they have raised any of their concerns with agency management (one would hope so!) but their "digital bad; in-person good" viewpoint also came to mind after reading another article in this issue – "Survey (kinda) says" – in which the authors examine using AI to create synthetic research data.

Generating synthetic responses is certainly in its early days and I understand the excitement around it, even though I have to admit I still don't get how responses that are like real responses are any better than fraudulent ones. But, after moderating a session on survey fraud and data quality from dteet in our early-February Quirk's Virtual event ("Elevating data quality: Catching survey fraud before it starts" <https://bit.ly/3SOIVe5>) and seeing how fraudsters' ability to generate fake open-end responses using AI is likely only going to get more refined, I again started feeling like there are a lot of benefits to being able to share the same air as the person you are interviewing for your research project.



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Joe Rydholm can be reached at joe@quirks.com

Yes, I'm aware that focus group respondents can lie their way into a study or that their answers may be performative or otherwise inauthentic but you can at least see and hear that they are human beings as opposed to a PC in a survey farm somewhere in Asia. And yes, I get the difference between quantitative and qualitative research!

Where am I going with all this? All of the examples I've cited here have me thinking a lot about the value of physical presence – especially since we've kicked off our annual slate of Quirk's Events – with gatherings in Dallas (February 28-29), Chicago (March 26-27), London (May 8-9) and New York (July 17-18).

Circling back to the COVID-19 days, I can still feel the electricity and the elation that accompanied our first post-pandemic Quirk's Events, when it was again safe to laugh and talk in close proximity. The virtual events we staged throughout 2020 and into early 2021 were great – there's no denying the merits of digital – but it was truly a joy to be there in-person. 📍

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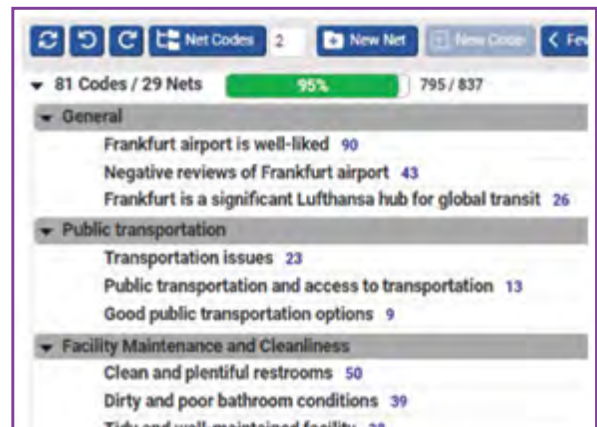


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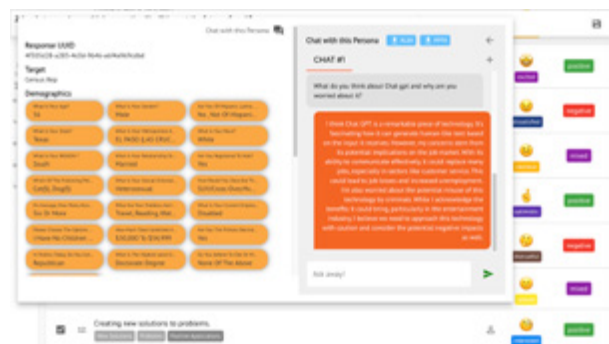
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Ascribe's Theme Extractor:

Revolutionizing open-end analysis with gen AI

In a dynamic market research landscape dominated by gen AI, Ascribe unveils a new release of its groundbreaking innovation – Theme Extractor. This cutting-edge technology integrated into Ascribe's CX Inspector and AI Coder addresses the challenges presented by ever-evolving gen AI and delivers effective, faster and cost-efficient open-end analysis.

Theme Extractor with gen AI initially delivered deeper understanding of customer thoughts and ideas by transforming single-word topic results into descriptive, meaningful themes, for example from “checkouts” to “have more checkouts open,” and by quantifying emotions factoring in sentiment strength and frequency.

The latest release takes a giant leap forward and overcomes issues created by the latest gen AI, improving result accuracy, simplifying complex themes and reducing overlap. For example, it separates complex codes like "salty and spicy" into "salty" and "spicy".

Perhaps Theme Extractor's most innovative and important feature is enabling human control, allowing users to guide and oversee the analysis. Manual changes such as toggling gen AI, providing context, editing results, training codebooks and setting the number of codes enable flexibility



that empowers market researchers to ensure that the text analysis results align with business needs.

In a landscape where gen AI is no longer a question but a necessity, Ascribe's Theme Extractor remains a game-changer for analyzing open-ends quickly and accurately. Connect with us today at www.GoAscribe.com to learn more.



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Bruce Peoples, Consumer Insights Consultant at Peoples Marketing Insights

As global travel continues to increase, we're excited to welcome our clients in-person both near and far. It's been exciting to dig back in the toolbox and pull out some of the more robust methodology options that involved a more personal, face-to-face experience. Our clients are loving not only the rich insight gains but also the unique experience of visiting participants in their city and immersing themselves in their culture.

Abby Goodell, President of Fieldwork Network International



There's a richness of interaction and that transmission of feeling, of communication, that comes with the sync of not only words but body language. And simply put, the humanity of being with others. The acoustics are not quite the same when a song is compressed into digital bits of data, and human interaction is no different. Some of the richness of that interaction and some of the opportunity for empathy is simply lost along the way.

Cory Lebson, Principal at Lebsontech

It is estimated that over 70% of communication happens below the neck. Product features like touch, weight, and contrast are simply not conveyed correctly in digital environments.

Jamin Brazil, Happy Market Research Podcast Host

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In-person research always has and always will play an important role for market researchers. In-person research is important for behavioral research whether testing reactions to life-sized stimuli, conducting eye-tracking, observational research or ethnography. Many game changing insights for companies would not have happened without in-person research. We behave differently in-person versus online and while each tool plays a different role in the market researchers toolkit, in-person is irreplaceable for certain research initiatives. With in-person research you can observe behavioral nuances, understand cultural influences and capture the impromptu moments when true inspiration and insight can happen. We've all been there when the biggest insight comes when the moderator leaves the room and the respondents talk on their own! Here's to a return to in-person research, enhanced collaboration, stronger emotional connections and measuring behavior.

Anne Stephenson, Partner at Explorer Research



QUIRK'S IN FOCUS

A digest of survey findings and new insights for researchers

●●● employee research

Education vs. experience

Employees feel unprepared to enter the workforce

When it comes to transitioning into the workforce, e-learning provider Go1 found that 46% of employees believe university failed to prepare them for their current jobs, with 61% saying previous work experience best prepared them for their current positions. This was followed by formal on-the-job training (41%) and life experience (37%).

When asked what they wish they had known before entering the workforce, 50% of employees said they would have liked to know how to approach career progression, the fundamentals of the role (32%) and how to collaborate with people in other departments (31%).

When deciding where to work or whether to stay at a job, 66% of employees say learning and development opportunities are essential and valuable. While increasing their salary potential is the top motivator to acquire new skills for Gen Z employees (45%), general personal development is the top motivator for Baby Boomer (62%), Gen X (55%) and Millennial (51%) employees.

Seventy-three percent of employees believe that their current employer offers learning and development programs that adapt to or accommodate their specific needs. In fact, over half (59%) feel empowered to ask for better learning and development programs suited to their specific needs.

However, organizations approaching learning and development as a “box-ticking exercise” is the biggest frustration for employees (30%), followed by learning content that is boring (27%), not personalized (24%) or too long (24%). In addition, employers may not be giving their employees enough growth opportunities, with 44% agreeing that their organization doesn't make the most of its potential for upskilling and growth.

Organizations are effectively creating opportunities for people to work and learn with different age groups, with 46% agreeing they have opportunities to do so often. Learning from their wealth of experience (60%), having more diverse perspectives (59%) and the opportunity to learn from them (57%) are the top benefits of a generationally diverse team.

When asked about the downsides of working with people from different age groups, people stuck in their own ways (45%) and different work ethics (41%) were considered the top drawbacks. Fifty-three percent also believe they learn differently compared to work in other age groups at the company.

As AI technology continues to permeate businesses and industries, employees are leaning towards optimism when it comes to the impact on their

work and ability to learn. Forty-eight percent of employees are open to using AI-generated learning materials or using AI tools to help them learn, while 45% of employees agree or completely agree that AI will help them develop skills needed in the workplace more quickly.

In addition, using generative AI (44%) and finding information more quickly (46%) were named the top skills needed to stay ahead of the AI curve. Younger workers are more likely to see AI as critical to their development, with Gen Z employees (31%) and Millennials (31%) looking to generative AI as the only learning tools they need, compared to 18% of Gen X and 12% of Baby Boomer employees.

The Go1 survey was conducted by Method Research and distributed by PureSpectrum among 3,000 adults aged between 18-75 who work full-time at office/desk-sitting jobs across Australia, the U.S. and the U.K.

••• small business research

Lagging behind

Shoppers need up-to-date technologies

Small businesses lack the convenience Gen Z and Millennials expect, according to website services company GoDaddy. Ninety-one percent of U.S. small business survey

respondents say they offer customers a convenient online experience yet only 21% of consumers – and just 19% of Gen Z – feel that’s the case.

While small businesses identified Gen Z and Millennials as top target audiences, their current practices tend to cater more to older generations. Gen Zs (73%) and Millennials (75%) say they would shop more at small businesses if they offered the same convenience as larger chain stores.

Seventy-three percent of Gen Z and 83% of Millennials enjoy a "buy online,

pick up in-store" option but only 34% of small businesses offer it. Eighty-five percent of Gen Z and 82% of Millennials want small businesses to accept contactless digital payments, yet 27% of small businesses do not accept them.

Unsurprisingly, 90% of consumers say it’s important that small businesses offer free shipping, yet 38% of small businesses do not. Eighty-nine percent say small businesses should have websites, as Gen Z (55%) and Millennials (61%) would make purchases from it. However, many small businesses

••• travel research

Bleisure travel takes off

Accurate recordkeeping, not so much

Despite rocky economic conditions and pressures within organizations to cut down on travel costs, business travel is making an unexpected and robust comeback. According to software and business services company Capterra, 46% of business travelers report going on more trips than before the pandemic. On average, they travel six times a year, with trips lasting about three days.

Seventy-one percent of companies indicated having spent over \$10,000 on business travel in 2022. Increased travel expenses underscore the importance of accurate reporting, as manual tracking leads to errors and fraud that can cost thousands or even millions of dollars. Ninety-two percent of travelers encountered issues with expense reporting, with 90% admitting to making mistakes during the process. While technology adoption is evident with over half of travelers using mobile apps (53%) or software (51%), 42% still track receipts manually. Forty-seven percent of respondents use spreadsheets, 35% use third-party services and 30% use automated expense reports.

Business travelers report numerous mistakes with manual entry including missing receipts (41%), incomplete information (29%), duplicated expenses (24%) and miscategorized expenses (21%). Twenty percent admit they’ve submitted reports that don’t meet company policies and 18% say they struggle with following and understanding their company expense policies.

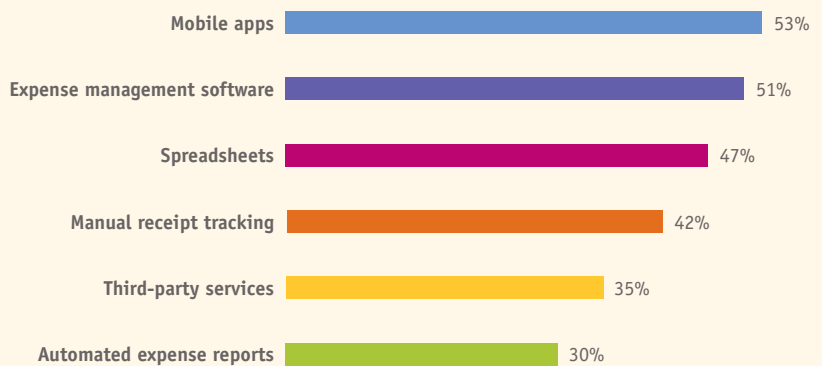
Even with the rising costs and potential financial errors, travel is necessary for business growth, especially as businesses move to in-person and hybrid models and therefore want more in-person meetings. In fact, over half of travelers schedule their trips for client

meetings (52%), as well as networking conferences (52%), training (50%) and trade shows (31%).

As an added benefit, almost all (93%) business travelers say they merge personal vacation time with work trips, which may help boost morale and decrease burnout from frequent traveling. Travelers are largely driven by the need for work-life balance (52%). Employees say they visit historical sites (31%), catch up with friends and family (30%) and attend cultural events (25%) during their off time.

Capterra’s Travel Survey was conducted in July 2023 among 398 business travelers in the U.S.

Many companies still rely on manual methods to record and report expenses



Source: Capterra's 2023 Travel Survey

indicate not having a website (24%) or an online store (28%).

The overwhelming majority of young consumers (80% of Gen Z and 75% of Millennials) say it's crucial for small businesses to have storefronts linked to their social pages for easy shopping. Small businesses say they are primarily using their social accounts for brand awareness over sales. Only 25% use social media to sell physical products and 19% use it to sell digital products. Forty-one percent of Gen Z and 43% of Millennials have followed a brand on

social media for a discount but 47% of small businesses don't offer discount codes when someone follows them.

Although nearly all small businesses (91%) agreed it's important to make sure their business is keeping up with tech innovations, they are not quite meeting the high expectations of an increasingly tech-savvy consumer base. When using a debit or credit card, a greater percentage of younger consumers say they prefer paying via tap-to-pay compared to older generations (50% of

Gen Z, 31% of Millennials, 23% of Gen X and 18% of Baby Boomers).

When asked if it's important that small businesses accept contactless digital payments, Gen Z (85%) and Millennials (82%) took the lead. Sixty-seven percent of Gen X and 40% of Baby Boomers believe contactless payments are needed while 33% of Gen X and 60% of Baby Boomers do not think they are important.

This survey was conducted with 1,000 U.S. consumers and 1,000 U.S. small business owners.

••• generational research

Grandpa's got this

Boomers embracing, advocating for new tech

Despite Baby Boomers' affluence and affinity for technology and digital experiences, just 6% of marketers identify the cohort as a part of their marketing initiatives, with most opting to "age down" their brand. According to the findings from marketing agency Razorfish, marketers may be neglecting some of their wealthiest potential customers who have the promise to become loyal and enthusiastic brand advocates.

Most Baby Boomers (70%) are curious about new technology and devices and are eager to learn how to use them either by reading about them in the news or trying them out for themselves. They are most interested in devices like

laptops, smartphones, smart doorbells, locks and security cameras.

More notably, Baby Boomers (70%) aren't intimidated or overwhelmed by new technology. They also serve as the biggest advocates for products with more than 30% stating that they love sharing new technology and apps with people close to them.

Technology enriches the full scope of their lives. Baby Boomers value technology's assistance in many aspects of their lives, believing that it is most important when managing their money (73%), staying informed on current events (69%), keeping their homes secure (59%), for entertainment purposes (58%) and when shopping for products (57%).

Baby Boomers do not rely on younger generations to evaluate the best products and applications. Most will take the initiative to visit brands' websites (71%) and read reviews online (56%) when making new purchases.

Online tools and positive digital experiences are a significant part of the shopping journey. Nearly three-in-four Baby Boomers research major purchases like kitchen appliances and other expensive devices online and one-in-four eventually buy these products online. While the majority still make large purchases in person, they are open to moving this experience online.

Despite common misconceptions, gamification is a key consideration in how Baby Boomers evaluate digital experiences. They expect mobile apps to be fun, intuitive and personalized and are likely to abandon apps that don't meet these criteria or are too complicated and lack guidance. Their favorite brands also align with younger generations, with Baby Boomers more likely to shop on Amazon (80%) than Gen Z (62%) and Millennials (70%).

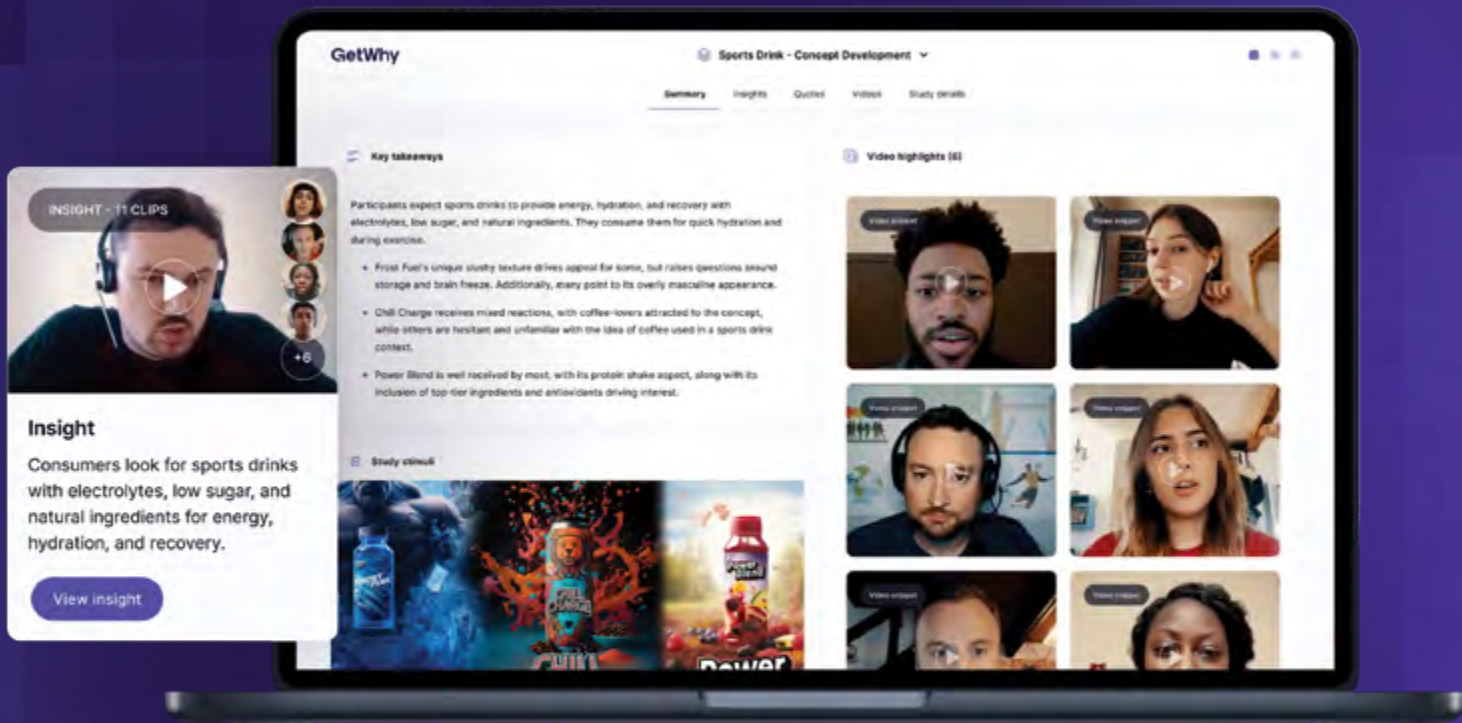
Razorfish partnered with GWI to conduct this survey with 1,003 U.S.-based Baby Boomer respondents.

Boomers think tech is important for the following aspects



Source: Razorfish's 2023 Digital Boomers study

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••• education research
Looking beyond tuition

Students and parents evaluate higher-ed options

Despite many media narratives blaming the rising cost of college for the public’s disillusionment with higher education, marketing firm Spark451 found that while money was an influencing factor in the college decision process, it wasn’t the most important one.

The leading deciding factor for parents and students when making their college decision was academic quality with cost/financial aid coming in second. When asked if the college their child selected was the most affordable, 56% of parents said no. Thirty percent said they would have encouraged their child to select a different school if money were not a factor. Fifty-five percent

of students applied to schools because they received an application fee waiver and 45% applied to the same number of institutions, even if they weren’t offered waivers. Sixty-five percent of parents said they would not make a college decision based on a state’s political stance while 50% of students said a state’s political leanings would influence their choice.

Students listed e-mails as their preferred method of communication with an institution, with text messaging ranking second. Despite this preference, many students say they don’t open e-mails that are sent to them. Twenty-seven percent of students say they didn’t open e-mails because they look generic and not personalized. Fifty-nine percent believe they would open an e-mail from a school they did not know if the topic or offer presented was of interest to them. When asked which print materials influenced them the most, students said personalized letters were the most

effective, followed by personalized brochures. Parents answered the same.

High school students began the college search process during their junior year, giving them considerable time to view a variety of materials and to form strong opinions on the marketing tactics they had seen. When it comes to selecting the right college, high school seniors and their parents conduct different kinds of research. When seeking information about a preferred university or looking for answers to a question about an institution, the most accessed source was the college’s website. Throughout the college selection process, students were more likely to utilize Instagram as their preferred social media outlet and parents were most likely to use Facebook. Eighty-four percent of students said that visiting campus was a part of their college search process.

This survey was conducted in the summer of 2023 among a randomized selection of high school seniors and parents of graduating high school seniors across the U.S.



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••• health care research
**For some patients,
 AI is not OK**

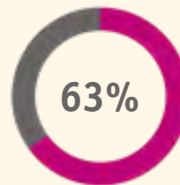
Lack of trust leads to tech limitations

The health care industry benefits greatly from AI but to successfully integrate it into business operations, it must be understood by patients and health care practitioners. Carta Healthcare found that on average, three-in-four Americans do not trust AI in a health care setting. Nearly four-in-five patients in the U.S. report not knowing if their provider is using AI when in reality, 100% of health care providers are using AI and have been for a long time. This discrepancy illustrates the public's misperception of the use of this technology, which is made evident by the 43% of respondents who admit there are limitations in their understanding of it.

Most Americans are unaware of AI usage and consider disclosure important. While most respondents don't know whether their health care providers use AI, they are torn about whether they would be comfortable with it – 49% say yes and 51% say no – even if it would help improve diagnostic accuracy (51% say yes, 42% say no). Two-in-five agree that their health care provider can provide better information than AI tools and one-in-three feel that AI tools can provide the same level of information as their health care provider. Twenty-five percent of respondents say

Concerns with AI

63% are concerned that the increased use of AI puts health care data at risk.



63% are worried that using AI may lead to less face time with their health care provider.

that AI tools can provide better information than their health care provider.

Regardless of actual usage, there is still disbelief and concern. Sixty-one percent trust that their provider would be able to use it properly, while 63% are concerned that the increased use of AI puts health care data at risk. Sixty-

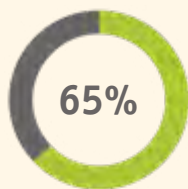
Trust in AI is low, but Americans are willing to educate themselves.

The survey also indicates low sentiment from health care consumers in terms of trusting and understanding AI. Only 38% of Americans trust AI and 57% feel they have a good understanding of it and how it's used in health care. However, Americans are open to learning more and indicate that a better understanding of it may improve their level of trust and comfort. Forty-seven percent feel that if they were to learn about it, they would be more likely to trust it. Sixty-five percent reported that if they were to have an explanation of the use in AI from their health care providers, it would make them more comfortable with it.

Forty-six percent say health care visits have gotten longer in the last two years and three-fifths believe that AI could be useful to assist with the shortage of health care workers.

Carta Healthcare, in partnership with Prosper Insights, commissioned an online survey of 1,027 U.S. consumers between August 18-29, 2023.

Understanding AI



agree that explaining the AI tools health care providers use would **make people more comfortable.**

three percent are also worried that the use of AI may lead to less face-to-face time with their health care provider.

Patients need disclosure; the vast majority (80%) report that their knowledge of AI use within a practice is important for improving their comfort.

Trust in AI tools

2 IN 5



agree that their health care provider is able to **provide better information** than AI tools.

1 IN 3



feel AI tools are able to **provide the same level of information** as their health care provider.

1 IN 4



say that AI tools are able to **provide better information** than their health care provider.

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Companies that specialize in data analysis can offer a variety of different but effective ways to gather and implement the information you need for your marketing research project. They understand the importance of quality data and have developed tools and methodologies to ensure you receive high-quality information.

Whether you're looking to gain insights on consumers or need specific tools or services, the following companies are prepared to help you meet your marketing research goals.



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Decision Analyst Inc.

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 Neil Dixit, Founder and CEO

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Verizon



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Verizon has partnered with other client and agency partners to establish an Accessibility Consortium to work towards closing the gap in making research accessible for all. Members of the Consortium will share tips and tricks learned so far to provide a better experience for both participants and clients with disabilities.

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Universal Destinations and Experiences

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Electrolux Major Appliances

The importance of industry-specific approaches 🗣️

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Wonderlust Collective; Session Curated by QRCA

The future of research: Generative AI as an enabler 🗣️

J.P. Morgan

Being human: How to traverse highly emotional territory in marketing research 🗣️

VMH Qualitative Research; Session Curated by QRCA

Your consumers are talking. Are you listening? How consumer-centricity sparks innovation ideation at Mondelez 🗣️

Mondelez International

The sky is falling! Why didn't anyone tell us? 🗣️

Merck & Co. Inc, USA

Connecting the dots to deliver creative that drives full funnel awareness and business results 🗣️

LinkedIn

Leading with Black insights 🗣️

Hunter-Miller Group, Inc.

The urge to splurge: Differentiating unplanned and impulse purchases 🗣️

EY



In order to achieve in-depth understanding of the nature of planned, unplanned and impulse purchases and underlying mechanisms of the purchase decision-making process, we leveraged neuromarketing research methodologies. The project provides valuable insights and business recommendations that can be applied by e-tailers, consumer brands and social media companies. Moreover, the project addresses an existing academic gap around the nature of planned, unplanned and impulse purchases.

NETWORKING & FUN

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Be Yourself LGBTQ+ Pub Meetup (LONDON)

The evening before The Quirk's Event begins meet fellow LGBTQ+ researchers and allies for a pint. Meet everyone at Ye Olde Rose and Crown in Greenwich at 6 p.m. There is no pre-registration required. Drinks and food will not be provided but are available at the pub.



Expo Hall Celebration

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

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The Quirk's Event utilizes the technology-enabled Klik badges and app, offering easy and fast networking in a touch-free environment. Attendees in close proximity can quickly exchange information simply by both pressing and holding down the bottom of the badge. Bright LEDs

will illuminate and flash, letting you know that the information has been exchanged. All your connections are stored in the app, allowing you to chat and reach out.



Karaoke Cocktail Reception (CHICAGO)

Sing your heart out, sip on delectable cocktails and create unforgettable memories with your fellow researchers. There will be a friendly competition, with prizes, for the most enthusiastic performer with the ability to captivate the audience!



cocktails
WITH QUIRK'S 

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

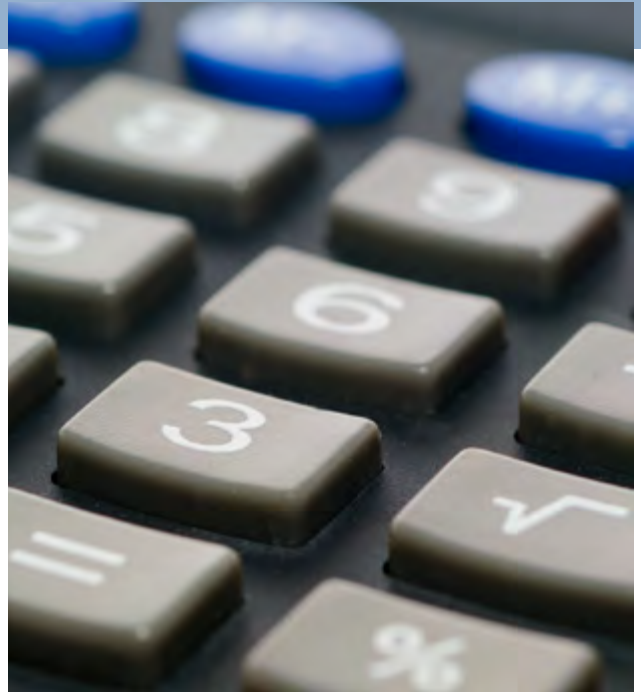
Additional Networking

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



Situational choice experiments for marketing research

| By Keith Chrzan



abstract

Keith Chrzan explores situational choice experiments as an alternative to choice-based conjoint, highlighting their distinct design and cognitive operations using examples of modeling physicians' therapy decisions and case studies in other contexts.

Situational choice experiments (SCE) resemble the more commonly used choice-based conjoint experiments except they have different experimental design requirements and they ask for different cognitive operations on the part of survey respondents – both of which lead to a statistical model that differs from the conditional multinomial logit typically used in conjoint experiments.

First of all in this article, we'll do a brief review of choice models and choice experiments. Then we'll cover the steps in a situational choice experiment, from design to data formatting to analysis and reporting. The most common use case for SCE is modeling physicians' therapy decisions. We also include two brief case studies showing other uses of SCE. A bit of background will clarify how SCEs differ from other kinds of choice experiments and from other kinds of choice models.

Choice models

The go-to analysis engine for choice modelers is the conditional multinomial logit (MNL) model (McFadden 1974, Ben-Akiva and Lerman 1985). Say we have a set of attributes that describe products (or services or, more generally, alternatives). And assume that alternatives differ from one another in terms of the specific levels they have for the attributes. We use conditional MNL to predict choice among alternatives based on the attributes and levels of those alternatives. For example, McFadden et al. (1977) interviewed commuters in San Francisco and predicted their travel choices (taking a bus, driving, etc.) based on attributes like travel times, wait times and costs. Guadagni and Little (1983) used scanner panel data from grocery stores to predict coffee purchases as a function of the brand, package size and prices of the products.

A special case of MNL is the polytomous multinomial logit (P-MNL) model (Theil 1969, Hoffman and Duncan 1988). With P-MNL, the attributes and levels do not vary across alternatives because they describe the chooser or the situation, not the alternatives. For example, the first time I used P-MNL

Figure 1: Example of a choice-based conjoint question

To replace your broken refrigerator, which option would you choose?

(1 of 12)

	Frigidaire	Kenmore	GE
Brand	Frigidaire	Kenmore	GE
Color	White	Black	Stainless steel
Freezer configuration	Freezer on top	Side-by-side	Freezer on bottom
Warranty	1 year parts and labor	5 years parts and labor	90 days parts and labor
Price	\$1,189	\$829	\$469
	Select	Select	Select

Figure 2: Fictional example of a situational choice experiment question

Patient 1

81 year old
Female
BMI: 29.5
Moderate anxiety
Former smoker
Moderately active

For the patient above, which therapy would you be most likely to prescribe to treat newly diagnosed hepatic sarcoidosis?

Lorcill

Viodin

Devron

Opans

DNR and exercise

was to predict the pregnancy decisions (terminate, give the baby up for adoption, keep the baby) of female prison inmates. P-MNL allows us to predict these choices as a function of facts about the woman's sentence, the availability of parole and demographics like her age, education, family structure and so on.

Choice experiments

If we add experimental control in the design of stimuli, we have a choice experiment. The most familiar of these features multi-profile choice sets analyzed via conditional MNL, a combination known as choice-based conjoint (CBC), discrete choice experiments or stated choice experiments (Louviere and Woodworth 1983). In a choice-based conjoint experiment, we show each respondent a series of a dozen or so questions that look like the one shown in Figure 1.

An experimental design makes the attribute levels independent. This allows us to isolate and quantify the value of each level of each attribute, entities we call "utilities."

This article concerns a less common type of experiment, a situational choice experiment. In a given SCE question, we have a single, experimentally designed profile that describes the situation or context of a decision and then two or more fixed alternatives from which the respondent can choose. In other words, the designed profile changes from question to question but the choice alternatives do not (hence, SCE uses P-MNL modeling). Across questions, the profiles conform to an

experimental design. A single SCE question might look like the one shown in Figure 2 (note, this is a fictional example and these are not the therapies one would use to treat hepatic sarcoidosis).

In the next several questions, the description of the patient changes but the five choice alternatives remain the same. So, the patient in the next question might be a 64-year-old inactive female smoker with a BMI of 23 and severe anxiety, for example. The only way for the alternatives' probabilities to differ is to have a separate set of utilities for each of the five choice alternatives. The P-MNL does this. Whereas CBC produces a single vector of utilities, P-MNL gives us a matrix of utilities, one vector for each alternative.

To review, SCE differs from CBC experiments. CBC uses experimentally designed sets of two or more profiles and uses conditional MNL. An SCE, on the other hand, uses experimentally designed profiles, shown one at a time, and uses polytomous MNL. Both produce utilities that predict choices among alternatives.

Few marketers know about SCEs and there does not seem to be a single source reference about them, two limitations the author hopes to remedy in this article. The next section walks through the steps involved in conducting an SCE, including a discussion of sample size. The final section describes commercial marketing examples of SCEs.

EXECUTING A SITUATIONAL CHOICE EXPERIMENT

Research design

Before choosing a design strategy, we need to know how many attributes and how many levels per attribute to accommodate. SCE sample size requirements increase with the number of attributes and levels. Most SCEs the author has run have had fewer than 10 attributes.

We construct an SCE design using an efficient design for single-profile experiments. Sawtooth Software's Lighthouse Studio, SAS and the design program Ngene from ChoiceMetrics all have efficient design algorithms that fit the bill, regardless of the number of attributes or the number of levels per attribute. For the special case in which all the attributes have the same number of levels, traditional orthogonal experimental design plans also work (Addelman 1962). The experimental designers currently available in R also work in this case. In practice we usually use software that makes our design in several blocks. Each respondent receives a randomly assigned block of questions. Software allows the user to specify how many questions each block contains while the orthogonal design plans tend to come in set sizes, which may not be convenient or respondent-friendly.

Design in hand, we next produce the SCE questionnaire, giving each respondent the questions from a given block in the experimental design. In addition to asking a single response as in the example above, we might ask for separate

Figure 3: Example of a multi-response SCE question

Patient 2

88 year old
Female
BMI: 20.6
Mild anxiety
Currently smokes tobacco
Extremely active

For each of these three types of hepatic sarcoidosis patients, which therapy would you prescribe?

	Lumoli	Woodin	Darvon	Opans	Diet and exercise
Mild symptoms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Moderate symptoms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Severe symptoms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

responses for different segments, as shown in Figure 3.

In some cases, we might want respondents to allocate their last 10 patients to treatments or to ask about the percentage of patients to which they would recommend each therapy (Figure 4).

Data structure

We next collect respondents' choices for each question and add them to the experimental design matrix. Now we have our data file ready for analysis.

Figure 4: Example of an allocation SCE question

Patient 7

62 year old
Female
BMI: 20.5
Mild anxiety
Currently smokes tobacco
Extremely active

To what percent of your hepatic sarcoidosis patients would you prescribe each of the following therapies?

Lumoli

Woodin

Darvon

Opans

Diet and exercise

Total

For example, the hepatic sarcoidosis data from a single respondent might look like Table 1.

In the analysis software we might treat the predictors as categorical. Alternatively, we might to treat age and BMI as continuous variables. In this case, our data from the first respondent might look like this Table 2.

To create our analysis data file we simply concatenate the 12 rows of data we get from each respondent; in this

example where each respondent makes choices for each of 12 patients, our analysis data file would contain 12 times as many rows as we have respondents.

Modeling and reporting

General-purpose statistical software like SAS, SPSS or SYSTAT offer canned P-MNL routines. You can also access such programs through specialty choice modeling packages like NLOGIT from



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Table 1: SCE data for one respondent

Question	Age	Sex	BMI	Anxiety	Smoking	Activity	Choice
1	3	2	3	3	3	3	2
2	2	2	2	3	3	2	4
3	3	2	3	2	1	1	3
4	3	2	1	1	4	3	3
5	2	1	2	2	4	3	4
6	3	3	2	3	4	3	1
7	1	2	2	3	4	2	2
8	1	3	3	1	2	1	1
9	1	3	1	1	1	2	2
10	1	1	2	3	1	2	1
11	1	3	3	2	2	2	2
12	1	3	3	3	2	2	2

Table 2: SCE data file, some continuous predictors

Question	Age	Sex	BMI	Anxiety	Smoking	Activity	Choice
1	88	2	31.0	3	3	3	2
2	81	2	26.5	3	3	2	4
3	88	2	31.0	2	1	1	3
4	88	2	20.6	1	4	3	3
5	81	1	26.5	2	4	3	4
6	88	3	26.5	3	4	3	1
7	62	2	26.5	3	4	2	2
8	62	3	31.0	1	2	1	1
9	62	3	20.6	1	1	2	2
10	62	1	26.5	3	1	2	1
11	62	3	31.0	2	2	2	2
12	62	3	31.0	3	2	2	2

Econometric Software, the mlogit and nnet packages in R or in the MBC program for logit modeling from Sawtooth Software. Because P-MNL is a special case of conditional logit, you can also trick conditional logit software into running P-MNL analysis. This can be handy when you collect constant sum data as in Figure 4.

Analysis will produce a set of model coefficients (utilities), one per level in the dependent variable. One column of all zeros represents the reference level of the dependent variable. For example, the utilities from our hepatic sarcoidosis example might look like those shown in Table 3.

In this model, all predictors were categorical, so that each has a reference level row set to zero. Of course, the statistical software will also produce standard errors and model fit statistics. These allow us to calculate the p-value of each of our utilities and to test alternative models.

Some academic modelers prefer to express the results as “odds ratios.” To

do this they exponentiate the utilities. With most marketing audiences, however, taking a number they do not understand, transforming it in a way they understand even less to produce numbers without an intuitive meaning to them is hardly a winning communication strategy.

Simulations

As a result, we typically deliver the model results to clients in Excel simulators. Using the same equation that calibrates the utilities from the choice response data in the first place, we can predict shares given any profile specified in terms of the attributes and levels. Thus,

marketers need not even see the utilities. Simply using drop-down menus for each attribute, the user can create a profile and then get share estimates, as shown in Figure 5.

Sensitivity analysis showing how shares change as patient descriptors change can directly inform marketing decisions.

Other modeling options

Modelers usually prefer mixed logit (which produces a set of utilities for each individual respondent) for their CBC experiments. Because of how sparse the data matrix is for SCE, however, we see a diminished benefit of generating respondent-level utilities. Even with the diminished benefit, however, having respondent-level utility models comes in very handy when building simulators that allow users to look at results for subgroups of respondents.

Figure 5: Simulator screenshot

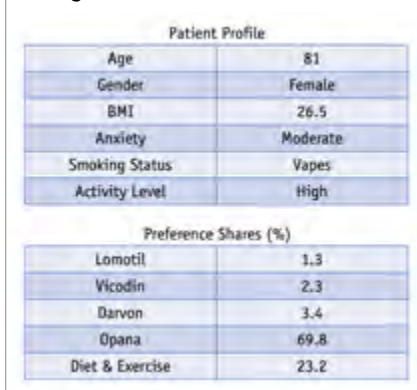


Table 3: SCE utilities (disguised example)

	Lomotil	Vicodin	Darvon	Opana	Diet and exercise
Constant	-1.162	0.304	1.661	0.111	0.000
62-year-old	-1.205	0.554	-1.314	-1.227	0.000
81-year-old	0.712	-0.386	0.132	-1.122	0.000
88-year-old	0.000	0.000	0.000	0.000	0.000
Female	-0.762	-0.933	-0.948	1.498	0.000
Male	0.000	0.000	0.000	0.000	0.000
BMI: 20.6	0.804	-0.997	1.634	0.176	0.000
BMI: 26.5	-2.330	-1.188	-1.159	0.303	0.000
BMI: 31.0	0.000	0.000	0.000	0.000	0.000
Mild anxiety	-1.091	-1.373	0.977	0.903	0.000
Moderate anxiety	0.616	0.128	-0.943	0.263	0.000
Severe anxiety	0.000	0.000	0.000	0.000	0.000
Non-smoker	-0.006	-0.632	-1.661	-0.548	0.000
Former smoker	0.451	0.450	0.913	0.949	0.000
Currently vapes	0.023	-0.261	-0.674	0.043	0.000
Currently smokes	0.000	0.000	0.000	0.000	0.000
Inactive	-0.079	-0.153	0.459	1.006	0.000
Moderately active	0.312	-0.643	0.142	-1.215	0.000
Extremely active	0.000	0.000	0.000	0.000	0.000

Sample size

Peduzzi et al. (1996) recommend that sample size for a logit model should be at least 10 times the number of parameters in the model divided by the choice probability for an alternative:

$$n \geq \frac{10k}{p}$$

where

n is the sample size

k is the number of non-zero parameters (utilities) to be estimated by the model

p is the probability of the least frequently chosen alternative

Imagine an SCE with six four-level attributes and five choice alternatives. The model will have a constant and $6 \times 3 = 18$ parameters per utility function. With four non-zero utility functions that totals 76 utilities. With five choice alternatives – and assuming we don't know which alternative will be the

least chosen – the average probability of choice is 20%, which suggests a number of observations of at least:

$$n \geq \frac{10(76)}{0.20} \text{ or } n = 3,800$$

If we ask 10 SCE questions of 380 respondents, we can get our sample size target.

Another sample-size rule of thumb comes from thinking about the sampling error around simulation shares. We know that a sample size of 100 produces margins of error of 0.098 for percentages and that halving that margin of error requires quadrupling the sample size. The sample size of 380 above would produce shares with margins of error of 0.05. For small experiments, the simulator margin of error will drive sample size more than will the Peduzzi et al. rule of thumb, but the latter will have more influence as the number of attributes, levels

and (especially) choice alternatives increases.

For example, an experiment with four two-level attributes and three choice alternatives would suggest a minimum of 300 observations:

$$n \geq \frac{10(10)}{0.333} \text{ or } n = 300$$

Asking each of 30 respondents 10 SCE questions would get you the minimum number of observations from the Peduzzi et al. formula. Unfortunately the sampling error around shares for a sample of size 30 would be an excessive +/- 0.18, or 18 percentage points.

CASE STUDIES*Therapy choice experiments*

The patient-type experiments such as the hepatic sarcoidosis example above are the most common application of SCE. These have small numbers of attributes, typically four to eight, and also small sample sizes. The populations

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from which we draw physician respondents come are small and they expect expensive honoraria for their participation in survey research.

Durable acquisition decision

In a study of high-priced industrial durables, a client wanted to know what product profiles drive preference among brands. CBC could answer that very nicely. But the client also wanted to know whether the industrial customers would opt to lease or to buy the products they chose. For this, we created a CBC experiment in which respondents faced a choice among three experimentally designed product profiles. After choosing the profile they most preferred, respondents answered an SCE question about that most preferred profile: Given what they know about the market, the products and prices available and their budgets, would they buy the product they selected, lease the product they selected or neither buy nor lease the product?

We combined both models into an Excel-based simulator and the client was able to see, for any product specified and in any competitive set, how many respondents preferred it more than the other products and how many of those would lease the product, buy it or go without it.

Retirement hybrid experiment

A financial services company wanted to forecast how many of its savers who would choose to retire and start drawing down their retirement accounts. An SCE featured attributes and levels that described the economic conditions (interest rates on investments, growth in home prices, inflation, recent and forecasted economic growth). We also had information on the savers stored in a database: their age, amount of savings, income, credit histories and so on. This additional information didn't conform to an experimental design but we included it in the model anyway – it would be silly to ask a 64-year-old married man with \$750,000 in retirement savings answer our questions as if he were a 58-year-old single woman with \$1,200,000 in the bank. We had

experimental control over the variables we designed into the SCE but we also had the database variables to provide even more context to the respondents' reactions to the SCE questions.

Increases awareness

Hopefully this introduction to situational choice experiments increases awareness of this little-known cousin of conjoint analysis. If so, it will help add a powerful new methodology to the researcher's toolkit. ①

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The power of B2B qualitative research and how to harness it

| By Morgan Goebel

abstract

Despite the rise of generative AI in market research, there is still a crucial need for nuanced human insights to understand the complex decision-making factors that affect B2B transactions.

W

ith the explosive growth of generative AI over the past year, a lot of talk in market research has centered around implications for quantitative research. But in B2B markets, quantitative data is not always substantive and automation may not fully capture the complexities of decision-making. There will still be the need to gather nuanced and observational insights about B2B audiences through qualitative methods.

WHY B2B NEEDS QUALITATIVE RESEARCH

Qualitative research can help to uncover and understand the human side of your B2B target market. Whether it's a farmer buying new tractor tires or a contractor determining which insulation brand to install, most business decisions today are still made by humans – who can be influenced by a range of complex factors and emotions.

While business purchasers typically consider tangible factors such as pricing, contract terms and return policies, decisions are not made on data and numbers alone. Relationships, brand perceptions and emotions play a critical role in business transactions. Bad decisions can harm an individual's reputation within their company and how a provider makes a buyer feel (e.g., trusting, confident) is often a crucial deciding factor. Through qualitative research, B2B companies can probe deeper to identify the underlying emotions and rationales driving business decisions, as well as the higher-order needs of B2B customers.

BEST PRACTICES FOR B2B QUALITATIVE RESEARCH

When conducting qualitative research in B2B markets, some best practices can set up a project for success:

Recruit the right people. High-quality insights come from quality respondents. You need to make sure you are talking to people who have sufficient involvement in decisions you want to understand and can speak to these decisions in detail. To do this, recruitment and screening needs to go beyond simply asking for a respondent's job title and industry. In addition, ask screening questions about specific roles and responsibilities, experience and technical

expertise and ascertain the individual's ability to articulate. This will ensure that the roofing contractor or investment banker you're talking to truly fits into your target audience and will be able to helpfully answer your questions.

Use participant-centered language. This advice is relevant across the board but it carries an additional nuance in B2B qualitative research. When possible, ask questions from the interviewee's perspective rather than their business's perspective.

For instance, instead of, "When your company purchases fasteners for a project...", ask, "When you purchase fasteners for a project..." Participants are already thinking in terms of their role at work; asking them about their company instead of them as an individual can result in more bureaucratic, surface-level answers, such as an explanation of the company's procurement process.

B2B qualitative research should go beyond organizational structure to uncover deeper, humanistic insights into purchasing pain points, brand perceptions and areas for improvements. Combining insights from several individuals and viewpoints provides representation of

the broader business perspective, without discounting the impact of the individual.


Use the right research method for the target audience and subject matter, with a focus on building rapport. Be sure to balance the research objectives, subject-matter sensitivity and target audience comfort when choosing a method for B2B qualitative research.

Some research objectives are better suited for one-on-one methods like in-person or phone IDIs due to the sensitive or privileged nature of the research (e.g., business sourcing methods), while others are better suited for group research methods. For example, dyads or triads can be very effective when seeking to understand the perspectives of multiple audiences on a topic (e.g., understanding how different departments within a company interact during the B2B purchase process), and focus groups are well-fitted for gauging reactions from a diverse cross-section of the target audience to physical stimuli (e.g., product prototypes) or new messaging collateral and concepts.

Regardless of the research method you choose, it is important for the moderator to build rapport and trust with participants early on, so that they are comfort-

able opening up. Depending on the audience and the research topic, individuals can be skeptical of participating in B2B market research because they don't want to reveal any trade secrets about their business, especially when participants know there are other individuals in the room who have similar roles in the same industry. Moderators have the unique and important job of assuaging these concerns while making respondents feel at ease and willing to share.

Tell a story

When done right, B2B qualitative research can tell a story that numbers alone can't. Qualitative research can help B2B companies gain deeper insight into their customers and the people driving their transactions, ultimately enabling more purposeful and customer-centric business strategies. Despite the excitement around generative AI and its implications for market research, the need for human-led research in B2B markets is still evident. 

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We can work it out

In-house researchers offer tips for more harmonious client/vendor relationships

| By Joseph Rydholm

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

abstract

A collection of candid thoughts from Q Report respondents on what they'd like more – and less – of from their marketing research agencies.

Throughout our decade of conducting the reader survey for our annual Q Report we've only asked a handful of questions specifically about client-side readers' relationships with their vendor/agency partners (which, if you think about it probably means that the state of client/agency interaction is pretty good), choosing instead to focus more on methods and techniques and any other topics that are top-of-mind at the moment (like, say, a pandemic!).

When we have reported on readers' open-end comments, it's of course the pithy or critical ones that stand out. But it's important to note that there historically have been just as many responses in which readers express happiness, harmony and gratitude for their relationships with their vendors.

In other words, despite what you are about to read, clients generally view their vendors and agencies as partners and colleagues – which is especially clear when you attend the vendor-client-led presentations at our Quirk's Events and other industry conferences.

With that as a preamble, here is a collection of client-side researcher comments on vendors from the past few years of Q Report survey responses!

*There is a real gap between what our vendors can understand about our business and business challenges and what my internal clients need. That gap creates a challenge when translating our business objectives to a research objective and vendors simply are not good at making that connection. I wish they could understand our needs and drivers better so that they could **offer better recommendations** from the research. Now, all vendors like to make recommendations but they are either super obvious and just a regurgitation of the data or simply not useful and totally ignored.*

*I would love vendors to **understand our business better**. Every vendor meeting starts with "so tell me what you do currently." It would be revolutionary for a*

vendor to come in and say "Here is what I understand about your business and here are some ideas for how our tools can help you." To date, all discussions have been me telling them how they can help us (or not).

I wish research vendors would believe me **when I tell them that our customers are hard to find**. During intros and capabilities presentation, they tell me they can find hard-to-reach respondents. Then when I ask them to bid on a project, they take forever to let me know that they no longer can do it because the customer segment is too hard to find. I feel like I've wasted my time in screening and listening to their presentations.

To be honest, in the last few years I have seen a **drastic decrease in the quality and care of account management** on the vendor side. A sense of service and partnership has really gone out the window. They are quite interested in selling me things but not that interested to see that the work is being done properly or the results meet basic QC reqs. This is a barrier to everything at the moment.

"I would like a larger discussion on why costs vary so wildly sometimes and why vendors do not do a better job of communicating the value that I'll receive if I pay a higher price for their service."

They need to **hire higher-level people** and stop thinking that reporting is a low-level job. It's the actual product they sell.

We are sometimes stalled by internal procurement who doesn't understand that research is not a commodity. It would help if our vendors could **provide materials for corporate purchasing departments** that explain that they are reasonably priced but why they are

not necessarily the cheapest. I need their help to explain to others what makes their particular shops a better fit for us and why they are worth more.

"I am bombarded with cold calls and e-mails on a daily basis. It makes it difficult to sift through the options. All communication should include info on the company, a presentation of capabilities and use cases/white papers."

Quit selling me your whole "suite" of products/offerings and don't assume I simply manage projects and know nothing of research.

I would like to **improve communication around timing** and what is and is not feasible. I feel like many vendors say "yes" too often because they don't want to lose the business. However, sometimes they are over-promising and under-delivering.

The vendors we're worked with have been **VERY responsive via e-mail**, which is a huge bonus for us.

I have no issue communicating with vendors. I am very transparent about what I want and expect. I want vendors to be more rigorous and **make more effort to dig for insights** that make a difference in my business.

Would like tried and true vendors to be more innovative and new vendors with innovative products **better understand our industry**.

Know our business, not cold-call or e-mail telling us what they do. Try to **cater pitches** to help us be more efficient.

Stop sending **so many cold e-mails !!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!** [That's 34 exclamation points! – Ed.]

I wish they understood the need to **keep pricing consistent and affordable**. We cannot afford constant price increases like we are usually seeing.

Better coordination on the vendor side so I am not contacted by multiple people from the same company; or by the **SAME PERSON** multiple times who clearly forgets that we have already spoken or corresponded. That drives me nuts!

I think we're pretty good with vendor communication and management in general. If anything, I find that vendors are sometimes less responsive than we would like, or when issues come up there can be a **tendency to sit on it** and then come to us with a decision already made (or worse, acted on) without keeping us in the loop. We get it, stuff happens and things go wrong. But it's definitely a pet peeve when a significant issue arises and we are not informed until a decision is already made on what to do about it, especially if that decision has downstream implications we're not okay with.

"Vendors continue to lack the ability to tie together relevant facts into a coherent SHORT story. Twain once said, 'If I had had more time I would have written you a shorter letter.' Nine times out of 10 we get a data dump and that's it, even after coaching the vendor as to what we want."

Stop spamming me. I started out trying to be polite and say "no thanks" to all of them. Then I found out that if I respond, it only gets worse. Send your boilerplate cold-call e-mail twice. If I found it interesting I'll respond. Don't call the company switchboard and call me out of the blue – it's not persuasive, it's invasive.

“Stop trying to sell and listen!!! Please! And don't tell me you are innovative or a GRIT top 50 company – I want real research solutions, not a sales pitch.”

I am really busy and wish my vendors would remember to **provide enough background information** to quickly address questions or issues that arise. Often we have an initial meeting, followed by the vendor pulling some additional information we need to make decisions, then meeting again to make a decision.

Our only research vendor is Qualtrics. We use their survey platform. It would be nice to **have one account rep who knows us** and how we use the platform, and who stays in the job longer than two months. Every time we need to talk with our rep, it's someone new and they know nothing about us. We have to spend time educating them about our needs each time before they can help us.

“Stop thinking that your black box is some great secret sauce. Almost all of it is known, papers published, open-source R code available, etc.”

I appreciate being able to reach out for a phone call to **get a pre-RFP sense of capabilities**, ballpark costs and timing.

What's happening during the RFP process? Feels like the RFP goes out, then falls into a black hole until the vendor decides to respond. Are they talking it over? Letting it sit? Waiting for a dept to respond?

Stop trying to only sell us on the high-level benefit and ROI. We already know and believe in that. Vendors must **convince us that they will deliver** by showing what they will actually do, how they do it, the tool capabilities or differentiation from what others/we ourselves can do.

We (in corporate research) have to pull plugs, change directions, do things that seem to make no sense, based on our internal demands and pressures. Sometimes I think vendors **don't quite get that** – they think we're bad clients when we're actually bobbing and weaving the best we can. Also, there are many wonderful research companies and we don't have enough work to go to everyone we think highly of. It's hard on the other side, but when we don't give you a job it may have absolutely no reflection on how highly we think of you.

Pretty satisfied with the research vendors I'm currently working with, but one potential area we could improve on even more is **additional ongoing communication** for them to further understand our internal issues and be empowered to make decisions and take responsibility on projects they are running without having to get direction from us on every little

nuance. (Basically, become even more of a trusted partner and an extension of our research department.)

I want to always be up on the latest techniques, options, etc. Just because it is the latest does not necessarily mean it is the best, but **I need to be able to refute** as well as learn and grow.

Sometimes we put out an RFP and we are surprised by what we get back. Some are clearly **not doing their research on our company** and audience. We even had one that had the wrong organization name. Attention to detail, common sense and easy to work with/responsive are all very important attributes. 📌

“Some research vendors overcommunicate with us. When we indicate early in the year that we anticipate a need in December, they check with us monthly to see if that has changed. Believe me, if anything about the project timeline had changed, I would have let them know.”

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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OUT IN THE COLD

Younger qualitative researchers struggle to find their place in a post-pandemic world

Rather than taking advantage of the adaptability and resourcefulness of qualitative researchers who began their careers during COVID-19, some research agencies are leaving them on the digital sidelines.

By Florian Groth and Rieke Burfeind

As young qualitative researchers who embarked on our career paths during or in the aftermath of the COVID-19 era, we're acutely aware of the pandemic's lingering shadow on our professional lives. We are part of Generation COVID. The retreat of COVID-19 globally might prompt some to believe we've moved past its implications but the reality we live and work in suggests otherwise. Our everyday research practices still bear the marks of COVID-19's upheaval, so we thought other young researchers around the world must be feeling the same.

Digital research methodologies have largely taken precedence over traditional face-to-face interactions since the advent of the pandemic. Clients have learned that online research works – perhaps not as methodologically effectively as face-to-face research but good enough for the right questions and, above all, with the benefits of saving time and money.

Of course, face-to-face studies haven't vanished entirely, with the occasional project or even some thrilling international ethnographic work cropping up. Yet young researchers we have spoken to observe a trend: such opportunities are scarce for our generation and a full spectrum of qualitative research techniques remains out of our reach. Why is this? Because the few studies that are complex, expensive and, let's face it, exciting, tend to be assigned to senior researchers.

To explore these issues and other ongoing impacts of the pandemic on contemporary work life, we connected with 14 of our peers from across the globe through a series of one-hour digital interviews. These market research agency professionals were between 20 and 35 and had entered the industry during or shortly after the pandemic, mainly within the last three years.

Early in our interview process, we encountered two glaring truths of Generation COVID. First, regardless of the country or the local work culture, be it the 10-hour office days typical in Asia or the American preference for eight-hour remote workdays, young researchers from all over the world face similar problems. Second, the situation

is more concerning than we initially anticipated.

We started the interviews with the hypothesis that the pandemic might have ushered in a mix of both positive transformations and challenges to the field of market research. What we heard: The problems are big, they are constant and they are urgent. Among our interviewees, over half expressed dissatisfaction with their day-to-day work, three were contemplating resigning from their current positions and two were considering exiting the market research field entirely.

One researcher's reflection was particularly telling:

"When I started my job in qualitative research, I was given the choice: office or home office. I opted for 100% remote. Today, one year later, I know it was the wrong decision. I'm now quitting my job and I don't want to work in qual research ever again."



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Unwelcoming conditions

Many members of Generation COVID are opting for the seeming comfort of working from home – a supposedly easier path which has actually led them into a trap. Out of the 14 young researchers we spoke to, most were taking the call in their home office. And by "home office" we don't mean a big, light-flooded workroom but rather a crammed studio apartment with a kitchen, bedroom and workplace all in one. In theory, these young professionals could go back to their corporate offices but many choose not to due to the unwelcoming conditions they're met with. Our interviews revealed that many know their colleagues just as faces on Zoom, a situation that fosters social barriers that are tough to break, especially for newer team members post-COVID-19.

While working from home means they forgo lengthy commutes and awkward social interactions with unfamiliar colleagues, a kind of vicious circle develops: The more Generation COVID stays away from the office, the more they miss out on learning from other researchers, having informal chats and forming social connections.

These factors don't affect senior marketing researchers, who have enough methodological skills and internal networks from years of in-office work to compensate for working alone. They also don't have a sense of the problems Generation COVID is facing because they can't relate.

Generation COVID encounters poor structures for informal communication. They do not have the internal company network to ask for help, to address and solve problems. One interviewee of ours encapsulated this sentiment:

"Working remotely, everyone is selfish. Everyone only looks at getting their own work done."

The effects of this hit new team members the hardest.

A two-class system

The issues don't stop there, they pervade the entire research process, starting with project planning. Our interviews highlighted a two-class system emerging from project planning in which our participants report pre-



“When there are cool international projects, they are given to the directors. I actually went into qualitative research because I wanted to travel a lot but I’ve never had the opportunity.”

dominantly getting online projects – managing pre-tasks, conducting online interviews and so forth – while the interesting face-to-face projects (scarce after COVID-19) are typically allocated to the veterans:

“When there are cool international projects, they are given to the directors. I actually went into qualitative research because I wanted to travel a lot but I’ve never had the opportunity.”

Working from home aggravates this problem: Those who are physically present tend to be in the right place at the right time for exciting projects. In contrast, those who work remotely are sometimes overlooked, even for planning meetings:

“Sometimes they forgot to invite me to the planning meetings. I then was told afterwards what online community I was supposed moderate.”

You could argue that it’s just the normal way of things: Young researchers have fewer years of experience – and thus fewer opportunities – than their older colleagues. But our 14 interview partners don’t even see the possibility of getting to the same level as their older colleagues because they are completely denied access to some methods.

They become online research experts but fear they’re missing out on broader skill development. This causes boredom, frustration and anxiety over career progression, leaving them feel-

ing like pretenders within their own profession:

“I became a senior a few months ago but I have never moderated f2f...I feel like an imposter.”

Failed out of sync

A recurring theme in our conversations revealed that our industry has fallen out of sync post-pandemic. Only a select group of young professionals expressed excitement about heading to the office for collaborative analysis sessions. These researchers cherish the in-person brainstorming, the tangible energy of working with real sticky notes and having a clear understanding of the expectations for their reports. However, for the majority, the experience is starkly different.

The common reality is that Generation COVID is working asynchronously from their more senior coworkers. The newbies are given an analysis assignment, which they draft at home. Their senior colleagues then add their thoughts and the newcomers navigate the subsequent analysis phases in isolation. The casual yet insightful discussions at the hotel bar in the evenings after face-to-face field days that once used to be the starting point of joint analysis, helping structure and verbalize reports, are now remnants of the past. Consequently, the COVID generation usually has no real sense of what a good report should look like and, above all, they often don’t dare to ask for



“Sometimes they forgot to invite me to the planning meetings. I then was told afterwards what online community I was supposed moderate.”



“I became a senior a few months ago but I have never moderated f2f...I feel like an imposter.”

help. The hurdle of calling colleagues virtually to get answers to questions that they can’t even formulate themselves is too great.

Always on, never off

Generation COVID is also witnessing a blurring of work-life boundaries. There’s an absence of informal dialogue – uncertainties about when others sign off for the day, what defines a well-completed report or if deadlines are flexible. Without enough experience or a supportive professional network, they struggle to navigate these nuances, leading to overwork:

“Working 100% from home means you have no physical, no psychological break. Sometimes I sit in front of my laptop until 10 o’clock, basically exploiting myself. You can feel the walls in your head, not just in your house.”

What now?

We’ve laid out the struggles faced by Generation COVID, underlining a palpable sense of dissatisfaction. It’s time to pivot our focus to what the whole qualitative market research sector can do to rectify these issues – not merely for comfort but for the urgent preservation of our industry’s future.

As mentioned before, a few of our study participants do commute to the office, benefiting from the interactions with colleagues but sacrificing some flexibility in return. Others see no appeal to commuting, preferring to retain the flexibility of remote work, even if working from home keeps them unfamiliar with their colleagues and leads to missing out on potential opportunities. It’s a trade-off. Yet, the solution isn’t in forcing Generation COVID to



“Working 100% from home means you have no physical, no psychological break. Sometimes I sit in front of my laptop until 10 o’clock, basically exploiting myself. You can feel the walls in your head, not just in your house.”

give up flexibility, as is often attempted by imposing fixed office days on employees. It is much more about creating structures that allow both interaction and flexibility.

Incentives instead of imperatives

Our interview partners gave us examples of structures that allow more flexibility and in-person interaction. Some ideas centered around compensating commuting and considering the time spent doing it as part of working hours. Interviewees said they were much more likely to make the journey to the office if their commuting time was counted as working time and they were given options such as company-paid taxi rides to the office twice a week. Such measures can draw Generation COVID back into the fold, fostering essential interpersonal learning and exchanges with their more experienced co-workers.

However, the mere presence of the younger generation in the office isn’t a fix for all the problems we as an industry are facing. There needs to be an office infrastructure that encourages meaningful learning and constructive interactions. The benefits of working together on-site should already be conveyed during onboarding:

“My onboarding was f2f: you get immediate feedback, you can ask questions. People can show you things you didn’t know existed, such as shortcuts on the keyboard.”

Shared office work also makes it much easier to impart tacit knowledge and hidden norms, things that Generation COVID doesn’t realize when working from home:

“I’ve learned the hard way that I have to keep evidence of my extra hours. Colleagues gave me the tip to screenshot them, I’ve overheard this during lunchbreak.”

We need structures to reconnect with our co-workers. Connections won’t spontaneously regenerate just because COVID-19 restrictions are lifted – we all have to work on them. Together.

Crisis DNA

Initially, we questioned whether the market research world would revert to its pre-pandemic state and if the younger generation would be the catalyst of change. The reality is, members of Generation COVID are currently not allowed to reshape the market research world. Its members are being relegated to online work. And some of them are leaving the industry. To prevent this from happening, it really comes down to two ultimate reshaping strategies:

We need to enable them. Don’t be a senior stay-at-home. It’s not enough to meet once a year at the holiday



“My onboarding was f2f: you get immediate feedback, you can ask questions. People can show you things you didn’t know existed, such as shortcuts on the keyboard.”



“I’ve learned the hard way that I have to keep evidence of my extra hours. Colleagues gave me the tip to screenshot them, I’ve overheard this during lunchbreak.”

party. The sense of community, the bonding, the learning happens during work. Sharing moments means sharing face-to-face moments. This is what you remember. Nobody remembers Zoom meetings. And the young generation needs to see the older generations face-to-face in order to learn from them.

We need to let them. Leverage the potential of Generation COVID! This generation is the one with the crisis DNA. They have learned to constantly adapt to new challenges and situations. They are the perfect researchers because they are curious and always able to get involved in emerging topics and technologies. By tapping into their potential, we can facilitate their growth and, in turn, (re)invigorate our industry! 📌

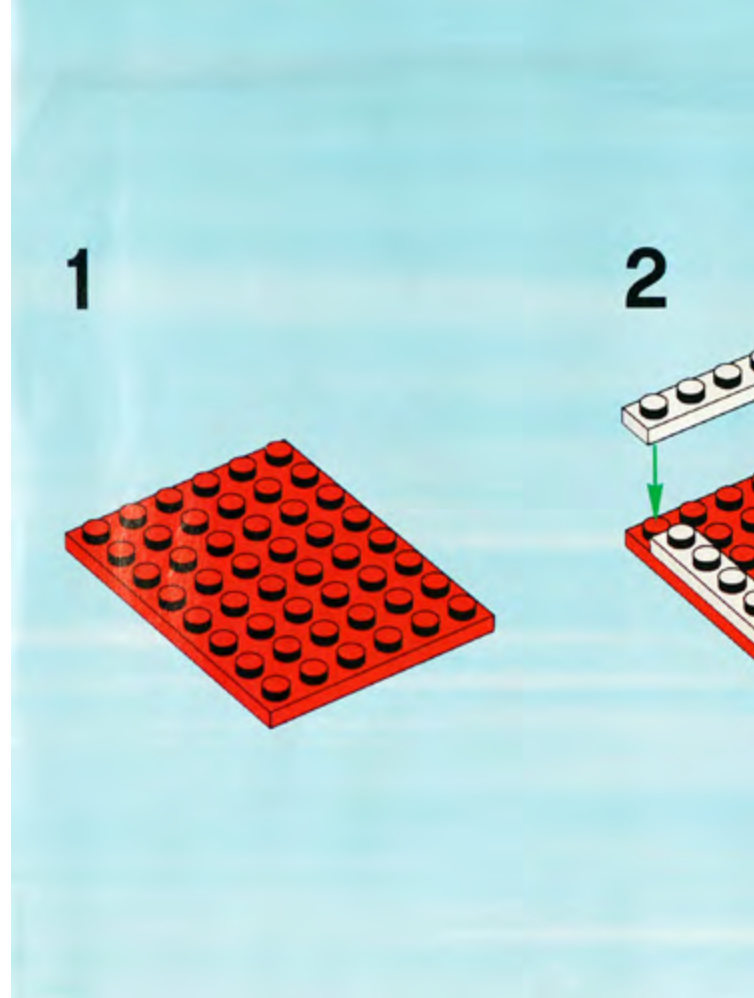
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••• the business of research

(Re)building trust

Could a blockchain for surveys be a solution to survey fraud?

| By Cam Wall



abstract

With data quality constantly under attack, Cam Wall argues that a non-profit clearinghouse of online survey activity could help the industry exclude bad actors from the research process.

Five years ago, you couldn't swing a dead cat (sorry, PETA, we need an animal-friendly alternative for this phrase!) without smacking an article about blockchain, including in the market research world. Web 3.0 was upon us, with blockchain providing a core protocol.

Web 2.0, you may recall, is the "social web" – marked not just by the advent of social media but the inclusion of interactive elements on a wide variety of websites. With Web 2.0, we went from being information consumers to content creators and masters of our own multimedia universes.

Web 3.0 is the "decentralized web" or, viewed through a slightly different lens, the "value web." Decentralized means that the information is hosted on individual users' devices rather than some central server. If Web 3.0 is to come about, blockchain technology, which proliferates information to all interested parties through a decentralized "ledger," will likely play a major role. The adjacent entities, cryptocurrency and smart contracts, will also very much be along for the ride.

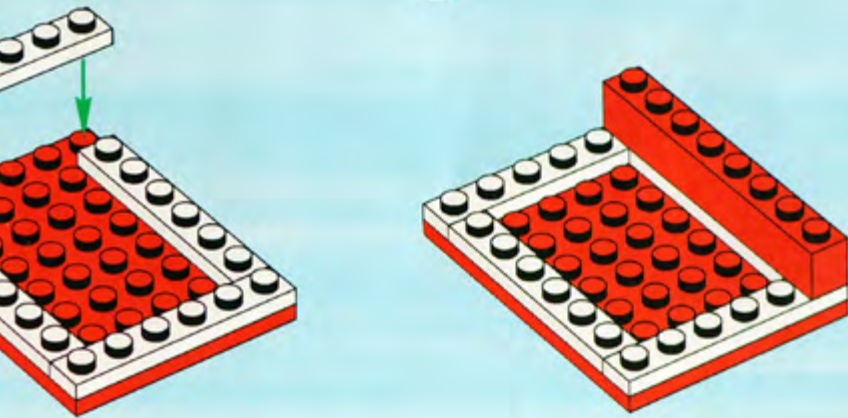
By value web, I mean that blockchain provides the technology to facilitate trusted exchanges of digital assets, which could represent anything of value in the real world. Keywords include ownership, exchange and trust. Again, cryptocurrency provides a well-known example, as do non-fungible tokens or NFTs.

Applications within market research

While it is easy to poke fun at the hype that has surrounded blockchain (and crypto and NFTs), it is an interesting and potentially useful technology, even if it doesn't revolutionize the internet. There are certainly some interesting theoretical applications within market research.

This should not surprise anyone. Blockchain is all about trust, the trusted exchange of information about a digital asset through an immutable ledger.

3



Market research is about truth, which presupposes trust in those providing, collecting and distributing information.

Through blockchain technology, everyday people can share data about their interests and behaviors in an anonymous way that cannot be tampered with by others and that redounds fair (agreed-upon) compensation directly to them.

Imagine the following scenario. I take a 10-minute survey about my grocery shopping habits. With a traditional survey, I give my data (survey answers) to the client sponsoring the survey and (likely) never hear from them again. With a blockchain-based survey, I answer a 10-minute survey about grocery shopping for free, but I own the data (with a private blockchain network, data can be hidden from everyone who has not paid for it). Grocery Store A can ask to see my data. I show it to them for \$5. But Grocery Store B can also ask to see my data and I can show it to them for \$5 as well. In theory, I could sell my data to a hundred grocery stores and only had to take the survey once.

While this sounds fantastic for survey takers, there are a few issues. For one thing, survey questions are sometimes idiosyncratic, meaning they elicit information that only the survey developer/sponsoring client cares about. If I take a survey about windshield wipers, there aren't going to be many companies banging down my door for my data. Just other windshield wiper companies. The catch is that if I am Windshield Wiper Company A and I want to run a survey of U.S. car drivers, I would probably rather deploy a survey in the conventional way than on a blockchain because I don't want other windshield wiper companies to easily get the same data and see what I asked on the survey.

Another issue has to do with timeliness of the data. Survey data has a rapidly diminishing shelf life. Windshield Wiper Company B might come across survey data for sale on the blockchain that was commissioned by

Company A, but if the survey was three years ago, they probably wouldn't want to buy it. As someone taking surveys and building up data to sell, my supply is constantly going bad and there's a question of whether it's worth it to maintain data resources like this.

Lastly, there is the tricky issue of anonymity. With cryptocurrency, one of the key features is that anyone can create an anonymous account. From the perspective of survey takers, anonymity is great. You could provide sensitive information about yourself without anyone ever being able to trace it back to you. One of the cool things about blockchain is that you can also build a reputation as a reliable and truthful survey participant and any survey company can verify this before sending you a survey.

The catch, as with all online survey panels currently, is that you could say you are a U.S. consumer but be in China using a VPN. Furthermore, you could create as many accounts as you want and make money by taking surveys all day. This is undesirable from a data quality perspective. Again though, this is not a problem that would be particular to blockchain.

As you can see, there are a few reasons why blockchain surveys don't really exist. By blockchain surveys, I mean surveys where your data (survey answers) are encoded in the blockchain. If you decide, after reading this article, to start a blockchain survey company and end up making millions, please say nice things about me.

Beyond survey data

With that said, there are blockchain-based market research companies. Three that I know of are Measure Protocol, Opinion Economy and Veriglif. The concept is the same as with blockchain surveys – you own your data and sell it to brands through a blockchain protocol as you see fit. It's just that the data in consideration goes well beyond survey data. With Measure Protocol, for example, you are essentially selling data about your online behaviors including your Google searches and your visits to certain websites. This data is more clearly useful and is always fresh because the tracking feature of the app you use is always turned on.

I should note that there are similar activity-tracking apps, such as Survey Junkie, that did not base their technology on blockchain, and you might wonder whether that matters.

Consider blockchain developer Gideon Greenspan's rules of thumb for qualifying a blockchain use case. According to Greenspan, the data at issue needs to be updated by multiple parties that cannot be assumed to trust each other. Furthermore, all transactions should be dependent on prior transactions within the system. Importantly, use of the technology needs to be more efficient than an alternative approach.

If you want to share your smartphone activity through an app in exchange for a financial incentive, I'm not sure there is a need for blockchain technology to be involved. The data is flowing in just one direction – from your phone to the app company and then to their clients. I would also guess that blockchain would not be a cheaper base on which to build the app.

Now, you may be wondering, have I led you all this way just to discount the idea of blockchain as a key technology in market research? In fact, I have one use case that I think might work well and it is related to online surveys.

There are within the market research world two relatively well-known fraud detection services for online surveys. There is Research Defender, which was acquired by Rep Data in October 2023, and there is Imperium, which is owned by the behemoth survey panel company Dynata. These companies essentially track the survey-taking activities of users across all of the panels with which they partner and can flag bad actors. The users are tagged or identified by their digital fingerprint, a technique that allows you to know that, for example, a member of Panel A is actually the same person (or very likely using the same device) as Member X of Panel B. If Panel A finds this member to be a bad respondent, the fraud detection service can alert Panel B as well, allowing them to remove the same person from future studies. You can also use such a service to, for example, say that you don't want to invite anyone to your survey who has already attempted five surveys that day. Again, the value is that this information spans multiple panels.

One of the biggest weaknesses of these services is that their knowledge of panelists' activities is limited to the panels with which they partner. When it comes to the universe of essential survey fraud data, Imperium has part of it, as does Research Defender. You can pay for both services, as many companies do, but the data is never completely bridged. You need separate quality-control rules for the separate services.

Here is my radical idea: The industry should create a non-profit clearinghouse for all of this data so all online survey activity, no matter the panel, gets tracked and is available to all research companies participating in this clearinghouse.

This approach has worked well in the education sector, where students' enrollments and credentials are tracked across nearly all higher ed institutions by the National Student Clearinghouse. If a student has applied to a grad school and claimed to have a bachelor's degree from University X, the grad school admissions staff can verify this quickly through the Clearinghouse. Alternatively, University X can see if any of their students who have withdrawn enrollment ended up enrolling at another institution.

Imagine the same approach applied to online surveys. Every research company that uses panels to conduct surveys could submit a record of survey attempt/completion to the clearinghouse at the close of a project and this record could include flags for industry-defined "bad acts." At the onset of any panel survey, a research company could exclude bad actors from their survey knowing that they are getting complete information, spanning the whole industry (or, let's say, 90%). This would be a major step forward in the reduction of survey fraud.

To raise the stakes, let's say also that this clearinghouse tracks which panel was used in each survey instance and maintains two key metrics on all panels, visible to all research organizations. One would be the percentage of known panel members that have been flagged for fraudulent activity. The other would be the percentage of known panel members that attempt more than, say, five surveys a day.

Some might prefer such a clearinghouse to be a for-profit entity. I don't think Rep Data, which received \$6.25M in Series A funding in 2022, has the


resources to purchase Imperium, nor do I think they would sell their recently acquired Research Defender business to Dynata. The situation could always change, but that's the way I see it now. Perhaps a coalition of survey research companies and industry associations should lead the charge.

As for the necessity of blockchain technology in this case, you would have multiple actors constantly updating a ledger of survey-taking activities and you would need to know that the records are immutable. The panel companies being evaluated would certainly require this. Anonymity of those tagged in the system would not be a problem since you have a digital fingerprint that we will assume works adequately to identify unique survey participants. Individual panels would know the identity of their own members but survey respondents' actual identities could not be deduced from the data on the blockchain.

Sufficient motivation

The primary barrier would be the cost and effort involved in building the blockchain platform. Considering the large amount of money wasted each year on bad survey data, I would think there is sufficient motivation to take this major step in increasing transparency and reducing survey fraud across the board.

While it may seem like it takes effort for research organizations to report their survey activity data to the clearinghouse, it only takes a couple of days, according to Research Defender's website, to set up an initial integration between an org's survey admin platform of choice and the fraud detection service. Once the pipeline is set up, the data will flow. Certainly, the burden is no greater than it is now.

Perhaps I'll revisit this idea in another article down the road. For now, if you think the clearinghouse idea has legs, let me and others know and maybe send a note to your contacts at organizations like the Insights Association and ESOMAR. 

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Better together

Leveraging AI to unlock qualitative research at scale

| By Casey Mohan Schulz and Richard Scionti



abstract

Integrating qualitative and quantitative research, known as qual@scale, can harness the power of AI and human intelligence to provide cost-effective, comprehensive insights that help companies stay agile and make informed decisions in rapidly changing markets.

The power of combining qualitative and quantitative research cannot be understated and is long-supported. However, what if we could integrate the best of both worlds in a way that's not only more impactful but more efficient? This is where qualitative research at scale (qual@scale) enters the conversation.

Conducting qual@scale offers researchers many benefits. Thanks to AI, qual@scale fits between traditional qualitative and traditional quantitative research skills and approaches. Researchers can use larger qualitative sample sizes to design research that answers pressing business questions in a more relevant and timely manner than traditional methods alone.

From statistical significance to cost efficiencies, integrating qual@scale is a dynamic way to guide business decisions and support the exploration of business challenges in today's rapidly evolving landscape. While it feels like AI is taking over, from our vantage point, AI is only as good as the people steering it. The fusion of human intelligence (HI) and AI creates a "co-empowerment"

Figure 1





that opens a breadth of opportunity for synthesis, insight and insight activation (Figure 1).

Nuances and epiphanies

Larger sample sizes on qualitative data help researchers gain a comprehensive understanding of consumer behavior, preferences and attitudes. Capturing data at scale is just one piece of the puzzle. AI and HI enable researchers to better analyze, understand, categorize and synthesize data, further exploring its nuances and epiphanies in an iterative fashion.

This is a huge advantage for insights professionals and is why qualitative and quantitative research pairs so well. It helps businesses and stakeholders develop more identification of trends and patterns, without compromising the empathetic lens that qualitative research brings to insights. When qualitative is conducted at scale, researchers can confidently identify trends without losing the rich stories that are emblematic of qualitative research to maintain a holistic view of an audience. This marriage between qualitative and quantitative also helps to ensure that

organizations are moving forward with confidence, centering on authentic, engaged customer voices.

Qual@scale also helps us broaden who we hear from in research and enables more iterative approaches to qualitative research, as qual@scale is significantly more adaptive. Too often we limit insights to a specific demographic or segment. With qual@scale, larger sample sizes help ensure that findings are representative of a broader demographic and this diversity enriches learnings and builds further confidence in the insights. Additionally, larger sample sizes help researchers defend learnings, empowering researchers to assert their findings and provide insights that can be relied on for strategic decision-making.

Conducting qual@scale offers strategic advantages along with cost advantages. Researchers can maximize the value of their investment by finding the right blend of large sample sizes and qualitative activities and questions. This helps to ensure that multiple voices are heard and the humanistic activities are elevated in your insights.

The ability to support researchers as they nimbly identify emerging trends is a huge benefit of qual@scale. Qualitative is well-known for its ability to navigate white space and doing so at scale builds confidence in the ongoing shifts in consumer attitudes and/or behaviors. This allows researchers a clear path to learning in an adaptive fashion, identifying nuances and then evolving focus to explore as areas of interest emerge. Conducting qual@scale can be an effective method for micro-exploration, helping organizations stay ahead of trends and market shifts and shifting from a reactive to proactive approach. Figure 2 is an example of how qual@scale can be used for iterative research.

Consider key elements

Conducting qual@scale requires careful planning and steadfast execution to ensure researchers deliver strategic actionable insights. As a research team exploring qual@scale, it's important to consider key elements like sampling strategy and sources, tools used for data collection and analysis, quality assurance measures and flexibility in research plans. These focal points will help to ensure that efforts generate actionable insights

and evolve stakeholders' thinking and understanding of consumer behavior.

As alluded to, qual@scale should be designed with an iterative lens. Today, businesses are tasked with keeping up with evolving consumer behavior at a pace that moves faster than ever. An iterative approach to integrated in-



sights helps organizations move forward flexibly and in a manner that keeps pace with market evolutions, enabling human- and data-centric decisions that drive businesses forward.

Sample is a critical foundation of good qualitative research and qual@scale is no exception. While industry publications have long touted trusted insights as the North Star, the quality and relevance of the people we're talking to are foundational to the insights we deliver. As qualitative research scales, researchers are faced with a new but familiar challenge: getting the right people in the "room"...at scale. As sample sizes increase, researchers are often faced with the challenge of finding enough of an audience. These participants not only have to meet screening criteria related to demographics and psychographics but also thresholds of articulation needed to complete qualitative activities. Recruitment processes and engagement monitoring also need to scale and doing so effectively and at a reasonable expense requires strategy, collaboration and rock-solid project management. There are many paths to recruiting at scale with considerations including balancing across

the spectrum of traditional qualitative recruitment to quantitative panel sample to achieve qual@scale without compromising the richness of qualitative samples. This may include blending of sample sources, engagement styles and collection methodologies. All this included provides the potential for better projectability and representation, with a focus on audience-based cost efficiencies.

Limited functionality

One issue is that qualitative tools are not always built for qual@scale and survey platforms offer limited functionality for qualitative data, even with the best plug-ins. When choosing tools to support qual@scale, it's important for researchers to consider which features and functions best align with their unique research needs and stakeholder goals. A few areas to explore include:

Scalability: Ensure that the tool chosen can manage the volume of data being collected and includes features that help researchers automate engagement and analysis.

Flexibility: Tools for qual@scale should let researchers capture both structured

quantitative data and open-ended qualitative data. And while data capture is important, the backend is just as important for researchers.

Similarly, qualitative processes are not always built for qual@scale and there are important procedural considerations researchers are well served to think through before engaging in qual@scale.

Collaboration: In today's iterative landscape, it's important for researchers to define collaborative functions of available tools and technology, as well as define collaborative processes for teams conducting qual@scale. Qual@scale can be conducted as a standalone ad hoc initiative or built into programs that support strategic decisions in an agile fashion. To keep up with evolving competitive landscapes and consumer needs, researchers can bring qual@scale to agile programs – addressing business challenges with both empathy and data to substantiate themes surfaced in the qualitative research.

Experienced project teams: As said before, insights are only as good as

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the participants and program around them. An adept project team who's well versed in conducting qual@scale can help an organization identify the right tools and technology, design the right research program for data capture and enact strategies to maximize engagement and evolve guides. This enables companies to conduct the right kind of analysis to address business challenges, while also keeping pace with evolving competitive landscapes. It will also help to manage the people involved – recruiters, respondents, clients and project teams – to establish the right channels and cadence for communication.

Visualization is a crucial vehicle

Reporting is a crucial element of qual@scale; blending data and emotion is an art not a science. Analysis tools should offer capabilities like coding and categorization, provide emotional analysis and let researchers analyze structured quantitative datasets. As analysis moves from synthesis to reporting, visualization is a crucial vehicle for storytelling. Storytelling is what helps researchers deliver actionable insights. As research is being de-

signed, researchers should consider how they envision the data and activities will be analyzed. Perceptual maps, charts, graphs and qualitative frameworks are all fair game when qualitative research is conducted at scale. Data visualization helps researchers elevate insights and communicate complex findings in accessible, easily digestible ways.

To ensure qual@scale is actionable, and to help improve your speed to insights, explore data from multiple lenses, including:

Thematic analysis, which is a sweet spot for agile research and qual@scale. AI can quickly pick up identification of recurring themes but can also identify nuanced themes and sub-themes that are more nascent, making pattern-solving challenges a great fit for qual@scale. AI enables researchers to produce nuanced analysis of qualitative data with speed and precision.

Emotional analysis is another unique offering of integrated insights and is most rich and accessible from qualitative data. When emotion is captured and analyzed at scale, it unlocks a new perspective – an empathetic lens

that can break through boardrooms and inspire change and innovation.

Insights with an impact

Qual@scale is an innovative means for keeping up with the pace of change without compromising the quality of research. As researchers employ qual@scale at your organization, remember to infuse HI into the process, scale with agility and iterativity in mind, rigorously maintain data quality and deliver insights with an impact. 📌

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One industry, two markets

An overview of food and beverage research

| By Mark DiDomenico

abstract

While they share a basis in food consumption, the food-at-home and food-away-from-home markets are serviced by different channels with unique research and marketing strategies. Food-at-home spending relies on scan data for insights, while the larger and more complex food-away-from-home market, including a variety of food service venues, requires different methods for tracking and understanding consumer choices.

Food and beverage spending occurs in two distinct markets: food-at-home, served primarily by the retail grocery channel, and food-away-from-home, covered by the food service channel. The channels differ widely from one another and even though manufacturers often produce products for both markets, they generally employ separate sales and marketing teams for each.

Similarly, measuring spending, volumes and market share – not to mention consumer attitudes and perceptions – varies greatly for each market. Though research professionals regularly move between the retail and food service markets, standard practices for one market often do not apply to the other. Understanding the unique needs of executive leadership, sales teams and marketing professionals in each channel helps researchers provide the most valuable, relevant and important information and insights.

FOOD-AT-HOME: THE RETAIL CHANNEL

In 2022, the USDA found food-at-home spending was \$1.05 trillion, or 44% of total food spending, with the roughly 63,000 supermarkets in the U.S. accounting for the largest share.

Food and beverage manufacturers seek to influence grocery store shoppers' purchase decisions using consumer-focused marketing techniques, including everything from television commercials to internet ads to print coupons and of course, social media. For example, two brands of sandwich bread compete on the shelf, with branded packaging and placement, and the consumer chooses.

Data about these choices comes from scans at the checkout counter, allowing for detailed analyses of sales and dollar volumes, product movement or velocity, promotion effectiveness and market share by brand. The



scan data that is available today provides foundational insights for nearly all strategies and tactics in the retail channel.

FOOD-AWAY-FROM-HOME: THE FOOD SERVICE CHANNEL

According to the USDA, food away-from-home spending was \$1.34 trillion in 2022, or 56% of the total food dollar in the U.S. This spending is spread across approximately 1.5 million food service locations also referred to as stores or units.

With nearly 23 times as many stores or units as the retail grocery channel, the size and complexity of the food service channel makes detailed analysis of product movement and tracking nearly impossible, requiring an altogether different approach to research and insights.

Industry professionals who measure and track the food service channel specialize in both B2B and B2C research and have a different mind-set than their retail colleagues, who focus on consumer and shopper research.

Food service – all businesses selling food and beverages for immediate consumption – includes three main channels: commercial restaurants, non-commercial or onsite locations and retail food service locations. The most familiar of these, the commercial restaurant channel, is further divided into the quick-service, fast-casual, midscale or family dining, casual dining and fine dining segments.

Somewhat less understood, the non-commercial or onsite channel consists of segments where food and beverages are sold, but only in support of a different main business purpose: hospitals; nursing homes and other health care facilities; K-12 schools and colleges/universities; travel and leisure (airlines, hotels, entertainment venues, etc.); business/corporate cafeterias; prisons; and military bases.

The third channel, retail food service, includes prepared foods sold in traditional retail locations, including grocery stores (deli/prepared foods),

where you might buy a rotisserie chicken or a fresh-made deli sandwich and a cup of soup. Convenience stores, where you might pick up a hot dog off of the roller grill along with your gas fill-up, are another example. The lunch/dinner counter at other outlets like mass merchandisers and warehouse clubs also fall into the retail food service channel.

According to the International Foodservice Manufacturers Association, commercial restaurants account for the largest share of spending (68%), followed by the non-commercial channel (22%) and then retail food service with the remaining share (10%).

Tracking food service data

The sheer size and scope of the food service industry and the complexity of its supply chain create a significant difference in how the industry is tracked and measured via market research, analytics and insights. Multiple entities purchase and handle products before they even reach the kitchens of restaurants or other locations. (A full description of the food service industry supply chain would require a much longer article.)

This complexity, including an extended value chain, means that there is no single provider or service that can track 100% of the market, let alone do so at the SKU level. In fact, the largest tracking service available captures less than 60% of industry sales. In addition, SKU-level tracking only follows sales to the operator/store level, where most products then become ingredients – cheese on a pizza or turkey on a sandwich. At this point, the connection to the SKU is lost as the item becomes part of a menu item or even multiple menu items. There are no standards when it comes to how items are made and placed on menus, so standard tracking data, readily available in the retail CPG industry, does not exist in food service.

Understanding this difference, rather than trying to build a better model with incomplete data, saves market researchers and marketing executives both time and effort, and avoids the pitfalls of “directional” data that relies on estimates and assumptions, rather than specific data, for measuring and tracking product performance.

Shift in mind-set

Executives and marketers transferring to food service, accustomed to the clarity of grocery store scans, must adjust to what might seem to be a comparatively data-poor industry. The right

shift in mind-set, though, can flatten the learning curve. In reality, food service is not data-poor. There are more data sources than ever that can offer a comprehensive view of the industry and food/beverage trends, but the data are different.

Menu items can highlight category trends and several companies track menu listings and provide insights regarding penetration of trending food items, flavors, ingredients and preparation methods. This reliable source helps marketers understand category trends and identify opportunities for new product development and innovation. After all, menu items start with the ingredients purchased by the restaurant or other food service location.

Menu data, though quantifiable, is not the same as the product velocity and sales data readily available at retail. Does this make the data less insightful? Is this less actionable? No, of course not. In fact, marketers in the food service space have for over two decades been using menu penetration and trend data to help educate their

customers and to develop new flavors and menu items.

Exercise caution

Services that capture consumer purchases through panel surveys or credit card receipts can identify consumer demographics as well as attitudes and perceptions for meals purchased at food service. While the overall sample sizes for these services can be quite large, there are limitations, especially when researching smaller segments and/or product categories. While a “burger and fries” is a near ubiquitous meal, escargot is not. These nuances mean researchers and marketers alike should exercise caution when evaluating consumer data and remain mindful of the ways it differs from the more straightforward SKU data encountered in retail/CPG.

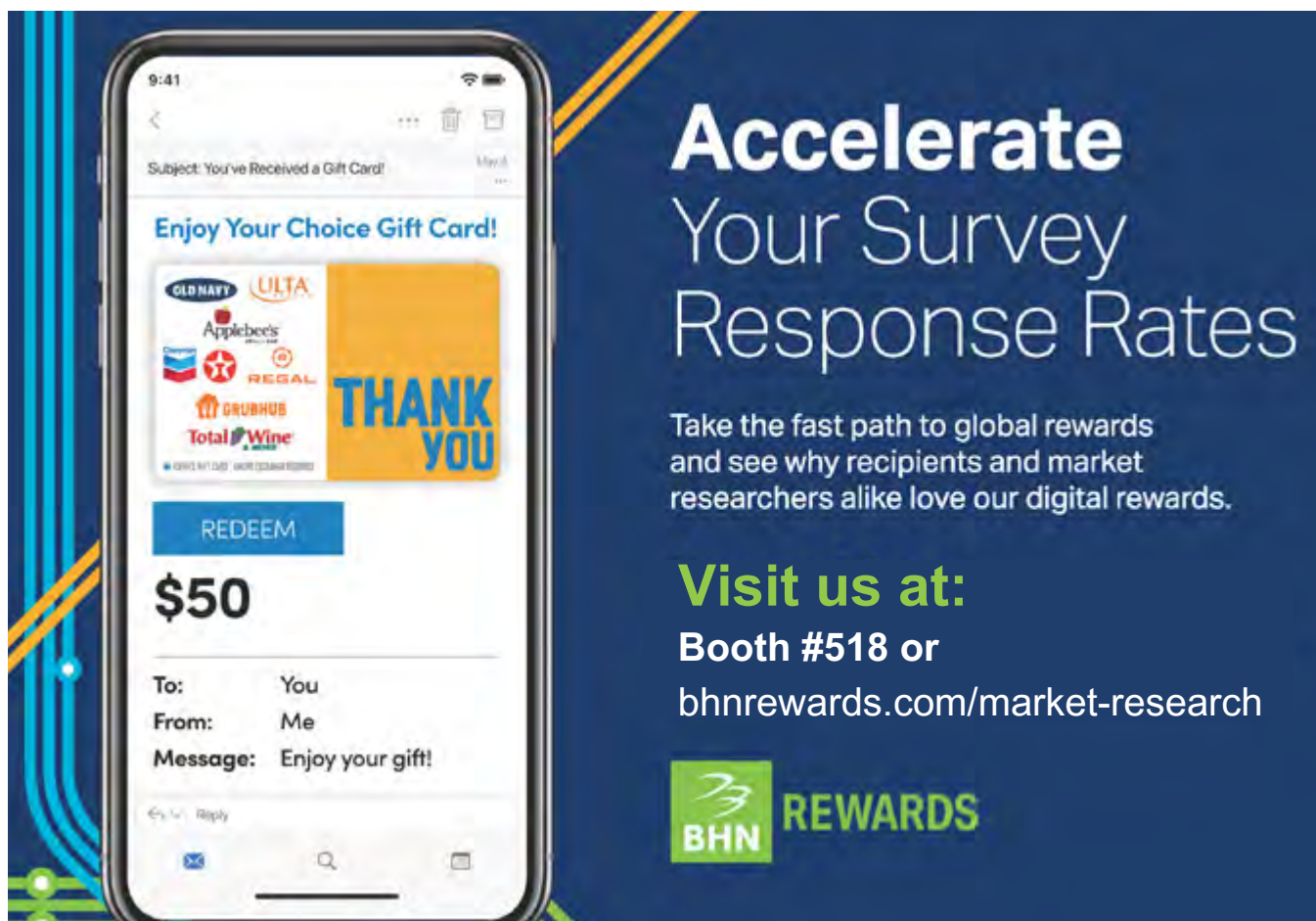
In addition to the services mentioned above, many food service manufacturers and chain restaurant marketers commission primary research with consumers. While retail/CPG manufacturers and outlets focus on the shopper, marketers in the food service space

focus on someone slightly different – the end consumer, diner or eater.

The retail shopper, usually the head of the household, makes purchase decisions at the grocery store on behalf of their family to fill their pantry. While useful for answering questions about eating at home, such shoppers don’t accurately reflect the full spectrum of the family’s eating and drinking behaviors. When asked about consumption habits, the shopper in many cases may not represent their household members accurately. Eating habits while at work or school can vary greatly from at-home habits, for instance, and accurately capturing insights around those eating habits requires a different perspective.

Consumers make different choices when eating away from home versus at home. And those choices are driven by more than just demographics:

- specific consumer groups – students or white- or blue-collar workers, for example;
- specific price-points – quick-service restaurants or convenience stores (value-oriented consumers and oc-



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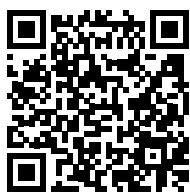
The advertisement features a smartphone on the left displaying an email notification for a \$50 gift card. The email subject is "You've Received a Gift Card!" and the body says "Enjoy Your Choice Gift Card!". It lists several brands: Old Navy, Ulta, Applebee's, Regal, GrubHub, and Total Wine. A large "THANK YOU" graphic is on the right. Below the list is a "REDEEM" button and the amount "\$50". At the bottom, it says "To: You", "From: Me", and "Message: Enjoy your gift!". The background is dark blue with yellow and white diagonal stripes.



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casions) or casual and fine dining (higher-income diners);

- specific dining times – second-shift workers heading home at night (convenience stores and some diners) or on-the-go occasions (bagels and sandwiches, not cereals or soups), and weekend family dinners, to name a few.

Occasions, pricing and logistics matter as much as demographics when considering food service consumer purchase decision drivers.

It bears repeating that in food service, the end-consumer does not make purchases from the manufacturer; instead, the food service operator is the manufacturer's customer. Consumers generally do not see manufacturer brands (except for some soft drinks, condiments, alcoholic beverages and dessert toppings) on menus. From the meat on your burger to the cheese on your pizza, most consumers are unaware of manufacturer origin.

In fact, the average consumer would not recognize the top brands operators count on for quality and value. As a result, food service manufacturers mar-

ket directly to their operator customers. Therefore, market research professionals in the food service channel employ B2B research methodologies to gain a deeper understanding of how products are used in food service and help identify new product and innovation opportunities, including new flavors or formulations, packaging and/or storage options. A&U studies, concept tests and pricing research enable manufacturers to build their brand stories with operators and develop products and promotions targeting specific segments and customers.

Most food service B2B research relies on a small sample of operator purchase decision makers from small chain or independent commercial restaurant operators, plus food service managers or directors in the non-commercial segments. Because business conditions and trends extend across the industry and across each channel and segment, a smaller sample, with appropriate coverage, allows researchers to capture significant insights.

Complexity of the channel

The complexity of the food service market, from a supply chain that is covered by multiple distribution and sales entities to the number and variety of locations available to consumers, means that food service research and insights require a different approach.

Far from being data-poor, food service research reflects the complexity of the channel. Attempting to use retail methodologies – or to read food service data with retail data expectations – leads to insights that lack meaning in a food service environment. Executive leadership, marketing and sales professionals and market researchers must recalibrate their focus to accommodate the different sources and types of data and insights available in food service. With that shift in mind-set, they can all glean the insights necessary to drive business success in the channel. 📌

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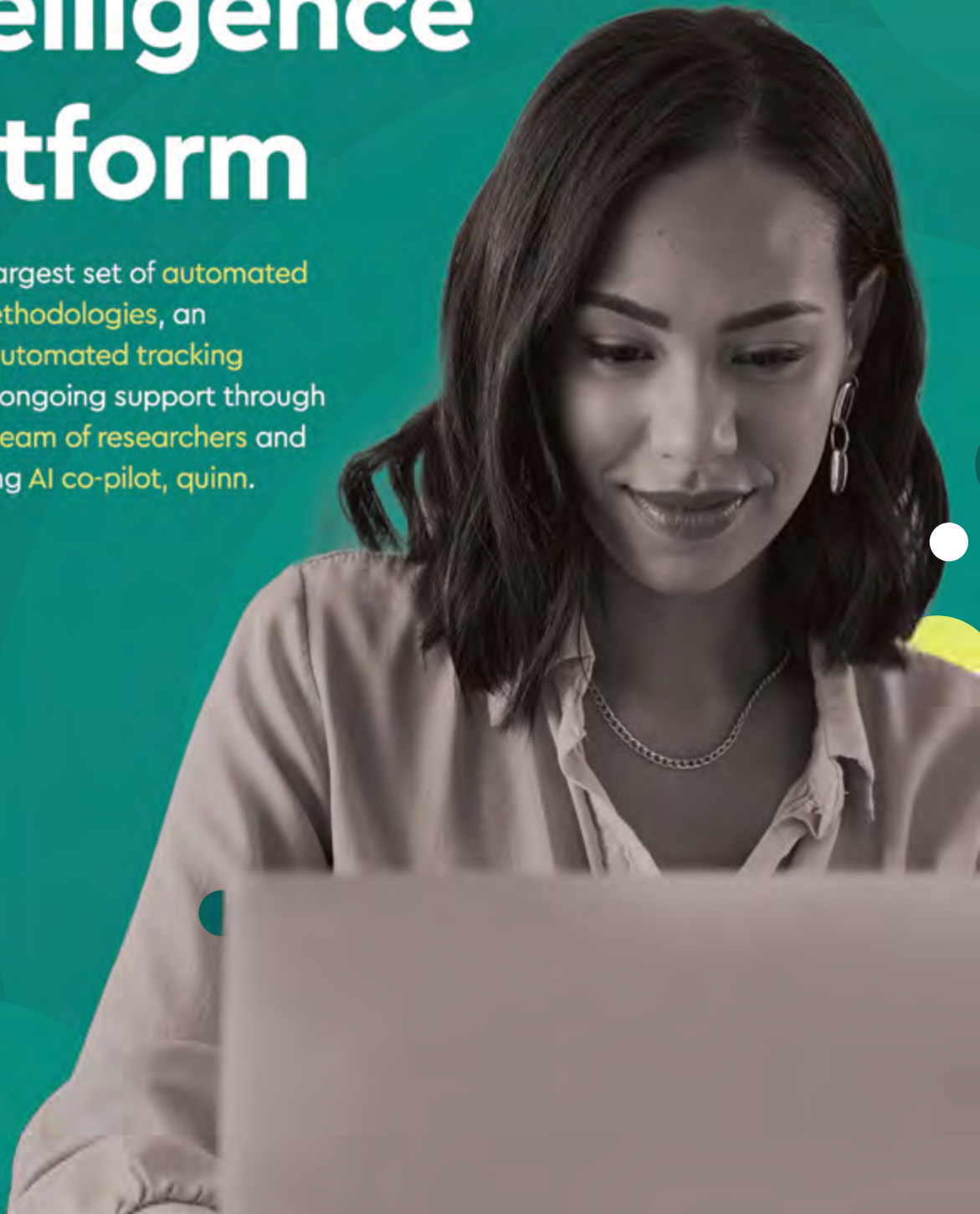
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••• ai & marketing research

Survey (kinda) says

The use of synthetic data in marketing research

| By Marco Vriens, Chad Vidden and Rogier Verhulst

abstract

The authors look at the potential of using AI, specifically synthetic data generation techniques like SMOTE and ChatGPT, to improve predictive models and segmentation typing tools and reduce costs in marketing research, highlighting their viability and the need for further validation and exploration.

With the introduction of ChatGPT by OpenAI and Microsoft, AI has become a major topic of discussion no matter where you go. Firms on the client side and the supplier side alike are scrambling to determine how to think about AI and how to possibly use it in their business. One exciting application of AI techniques lies in the creation of artificial or synthetic marketing research data.

Why would we want to use synthetic data if we can have real data? For several reasons. First, synthetic data can aid in the development of better models – better in the sense that synthetic data can help us understand and predict our real data better. Second, we will show that with the advances in ChatGPT we can generate complete survey responses that can in some cases eliminate the need to ask survey questions at all.

The latter is useful for multiple reasons. One, it can help us augment small sample sizes when we are dealing with hard-to-reach audiences. Two, it can save time, which is sometimes a vital decision factor as to whether to collect data at all. Three, it can save money.

In this article we review two techniques: creating artificial respondents using the synthetic minority over-sampling technique (SMOTE) to improve predictive models and segmentation typing tools; and creating artificial respondents using ChatGPT.

We discuss these two techniques in terms of viability, readiness and proven validity.

SYNTHETIC DATA

Data that is being generated artificially is often referred to as synthetic data. There are different ways in which this can be done, depending on what you want to use the data for. A popular approach that has been used for years in data science is the SMOTE technique.



Using SMOTE to improve prediction of brand choice

In initial qualitative research, our client became aware that there was an emerging competitor. They decided to include this competing brand in their tracking study. Few respondents were aware of this new brand and for every nine respondents that are aware of their brand only three are aware and know something about it. In the survey, they also asked about brand preference and only one out of 10 prefer this competing brand. Both brands were also evaluated on a small set of brand attributes:

- This is brand I trust.
- This is a high-quality brand.
- The overall value of this brand is great.
- It is easy to get value out of this brand.

The initial predictive model tried to predict preference for the client's brand vis-à-vis the competing new brand as a function of various brand attributes. We used a standard predictive modeling approach, i.e., logistic regression (see Vriens and Vidden, 2022).

The model had a good fit but nothing interesting came out of it. There were two problems.

First, the model simply predicted most to prefer our client's brand and where it predicted the emerging brand, it predicted wrong. The model achieved a 90% hit rate by doing that. At first glance, you would think that a model that predicts with 90% accuracy is quite good. However, that 90% is deceiving because the model did not predict anyone to prefer the emerging brand (see Figure 1).

Second, there were no significant effects in the model, i.e., none of the ratings on the brand attributes had any predictive value in predicting whether a respondent preferred the client brand versus the emerging brand. No insight was gained as to what was driving preference of one brand over another.

The problem is the imbalanced nature of the dependent variable, skewed heavily towards the client's brand. We can create more balance by creating synthetic respondents who prefer the competing brand by using synthetic minority over-sampling technique. (See Chawla et al., 2002.)

SMOTE roughly works as follows. Pairs of respondents are selected. One respondent from the pair prefers the client's brand, the other prefers the emerging brand. These pairs are chosen in such a way that they are similar in other respects (on demographics or other survey

Figure 1

1A		PREDICTED CHOICES		
		Client's brand	Emerging brand	
ACTUAL (TRUE) CHOICES	Client's brand	900	20	920
	Emerging brand	80	0	80
		980	20	TOTAL =1000

Figure 2

1B		PREDICTED CHOICES		
		Client's brand	Emerging brand	
ACTUAL (TRUE) CHOICES	Client's brand	850	50	900
	Emerging brand	50	50	100
		900	100	TOTAL =1000

questions). Then, a new “respondent” is generated that has values on the other survey questions that randomly lie between the two real respondents.

As a simple example, say one respondent prefers the client’s brand and gives it a trust rating of 7; another respondent is very similar on the client’s brand but prefers the competing brand and gives it a trust score of 6. The new respondent will have the same values as both original respondents and will be said to have given a trust score that lies between 6 and 7, say 6.7. This is done for all variables that are part of the typing tool model and on which the two original respondents have different values. So, even though this new respondent is artificial data, it is still derived from real data. This process of creating new respondents continues until we have the same number of respondents who prefer the client’s brand and the emerging brand.

We applied this method in the above case study. The results were dramatic in two ways:

- The model still predicted about 90% of the brand preferences correctly. If you look at Figure 2, you can see that the emerging brand is now predicted with 50% accuracy, whereas before applying SMOTE it was 0%. This is significant because we want to be able to predict what’s driving preference for this emerging brand.
- There were several interesting statistically significant independent variables. In our hypothetical case, for example, we found that trust and overall value were statistically significant predictors of brand preference. Hence, in this application our AI approach substantially improved the insights.

Using SMOTE to improve segmentation-typing tools

A firm had done a large international segmentation study and had identified four segments. While one of the four was substantially smaller than the others, it was the most valuable one for our client: It contained high-value customers, a group among which the client felt they could compete very well.

They had a typing tool for their segmentation solution that tried to predict segment membership based on demographics and media usage variables, enabling them to understand their segments better in terms of demographics and would let them reach the segments via media. The problem was, the typing tool could not predict at all who was in that strategic segment and hence the client couldn’t figure how to reach its members. This is because predictive models don’t handle smaller segments very well.

As with the previously explored segment, the typing tool can achieve a good overall accuracy by predicting the largest segment but that does not give us the insights we need. Thus, we applied SMOTE. We artificially increased the size of this smaller segment to match the biggest segment so that the predictive model can’t just focus on the largest segment.

In order to get a good overall prediction it has to predict all segments well. SMOTE is applied to all segments that are smaller than the largest segment until all segments have the same size. We do this because when all segments have the same size, the predictive model cannot achieve a high hit rate by predicting only one segment well. It has to do a good job with all segments.

The predictive accuracy for this segment increased from 0% to 90%, while

only marginally decreasing the degree to which the other segments could be predicted – a truly astonishing result because everyone who develops predictive models knows how extremely hard it is to get substantial improvements in models. Whereas the standard approach could not predict segment membership at all, after applying SMOTE, we can predict this valuable segment very well (see Vriens et al., 2022, for details).

Using ChatGPT to generate artificial survey results to reduce costs

ChatGPT is another LLM model. Brand, Israeli and Ngwe (2023) were among the first to use the ChatGPT model to generate fully artificial responses to survey questions. Note that such data is artificial because the respondents and responses that are generated don’t exist. However, they are in essence created from many respondents that have posted comments online on the topic the survey question is about (e.g., discussion boards, product reviews, etc.).

They created artificial survey responses from people making choices between two brands with two different prices. The price of the first alternative was kept constant whereas the price of the second alternative went up. As expected, the percentage of “respondents” choosing Alternative 2 went down as prices went up. They also repeated this but are now asking ChatGPT to find respondents with a higher income. As expected, the price sensitivity of these respondents was lower. So, it seems that at least directionally ChatGPT might get it right.



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Example

ChatGPT can help with response generation and analysis of any survey question. We tried several examples, from generating artificial responses to open-ended questions; to unaided awareness; to brand ratings. Here we show the steps to generate open-ended question responses, following the methodology described in Vriens, Chen and Schomaker (2019).

We first wrote a set of prompts (not shown here as they are proprietary) with three parts: 1) phrases an open-ended question, 2) creates response summaries, and 3) frequency tables (we note that there are many other options for analysis; this is just a simple example). There are three parts: the survey question, the demographic we are interested in and further instructions:

Part 1: The survey question and response

Prompt:

Survey question: "What comes to mind when thinking of the brand LinkedIn?"

Demographic: "Your task is to respond to a single open-ended question as if you were demographic X."

Further instructions: "Give a typical length of response to the survey question. Provide responses across groups of respondents that differ in their likelihood to recommend score (rating between 0-10). Make sure we have Detractors (rating 0-6), Passives (rating 7-8) and Promoters (rating 9-10)."

This script will generate the response of one respondent, so to get a sample we have to run it a number of times (100, 500, etc.) depending how large you want the sample to be.

Response:

"When I think of LinkedIn, the first concept that comes to mind is professionalism. It is a platform where people can showcase their experience and skills to potential employers and their connections. The networking concept is also a key concept as it allows individuals to expand their network and potentially find job

opportunities. It is also a great resource for job searching and career development whether it be through job postings or industry-specific groups. Overall, I view LinkedIn as a valuable tool to advancing my career. (Linda, age=28, 8, Passive)."

Note: In the prompt, we can indicate what range in ages we want, how much variance across respondents, etc.

Part 2: Response summary

Prompt:

"Your task is to summarize the consumer survey response. Use 10 words or less."

Response:

"Professional networking, job opportunities, career development."

Part 3: Theme extraction

The last part in our example is to get a quantitative summary of the frequency with which associations (concepts) with LinkedIn have been mentioned across our hypothetical sample.

Prompt:

Format: CSV format

"Your task is to extract the top key concepts."

Response:

Concepts	Frequency	Sentiment
Professional networking	67	8.4
Job searching	55	7.4
Career development	49	7.1
Personal branding	35	6.5


More proof points needed

We have explored the benefits of SMOTE, a viable and proven methodology, and also showed that ChatGPT can potentially dramatically reduce the cost of insights and help with hard-to-reach audiences – though more proof points about its validity and usefulness are needed.

Creating artificial responses using ChatGPT also complements primary research in validating overarching

conclusions. In other words, it can strengthen the findings if ChatGPT results point to similar implications, providing the organization with more confidence to act on the findings.

Using ChatGPT as a valid alternative to generate survey data is still an emerging capability. We don't yet know when and to what degree the ChatGPT-generated respondents will give insights similar to survey results based on real respondents' data and, related to that, if ChatGPT will be able to gather the same level of confidence from stakeholders.

We note, however, that we implicitly assume that real survey data is the gold standard. Survey research has limitations: it suffers from low response rates and increasingly problematic data quality from those who are responding (see Vriens, Elder and Holland, 2023). It might very well be that ChatGPT-generated data are simply a different part of the truth and serve to complement insights from traditional survey data collection. 

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••• multicultural research

Seeing a clearer picture

Removing self-bias when doing cross-cultural research

| By Isabel Aneyba

abstract

Researchers and marketers need to be aware of how their own perceptions can influence their understanding of people of color in order to gather the most useful insights and develop the most resonant marketing messages.

As a researcher and research company founder, I love when researchers and marketers can see Latino, Black and other cultural groups for who they are and I take very seriously the work of guiding clients to find impactful market, product and brand opportunities. One factor I have seen stand in the way of that is self-bias.

In this article I would like share the impact of self-bias in qualitative research by addressing and defining what self-bias is, why it is important as a qualitative researcher to remove it and how to remove it.

Self-bias is a particular tendency or inclination that prevents an objective perception of people, a situation or question. Most self-bias is unconscious. We all have our own unconscious version of it that comes from social stereotypes, attitudes and opinions we form about certain groups outside of our conscious awareness and we use social stereotypes of people of other cultures to navigate this complex world.

In each country or environment, there is a dominant group and culture that creates the acceptable norms and those who do not belong to this group are usually seen as different. The dominant group in the U.S. is white. People of color could be seen as different by people who do not know them.

There are three types of self-bias during research: self-bias between researcher and participants; self-bias between the participants and the client-side researchers and marketers; and self-bias between the participants. In this article, we will focus on removing self-bias between the researcher and the participants.

Unreliable insights

Why is it important to remove self-bias as a researcher when we interview people of color? Two reasons: self-bias causes pain to people of color who are interviewed and it also leads to unreliable insights and incorrect decisions for end clients.



Black people have a history of segregation in the U.S. As slaves they were afraid of risking their lives if they said or did something that was considered wrong. After they were free, they were not given the same work opportunities as other people. During slavery, they developed their own sense of community (culture) and their own language to survive. This history has affected the wellbeing and prosperity of the Black community. Black people are very aware of their history and are very sensitive to micro-aggressions.

Most Mexican Americans had a history of poverty in Mexico. Mexicans are the largest group of Latinos in the U.S., making up 60% of the Hispanic population. They moved from Mexico to the U.S. to survive and provide for their families. They are family-oriented, hard-working, resilient and humble. In the U.S., they take jobs that many people do not want to take in agriculture, hospitality, construction, janitorial, landscaping and gardening.

The 2004 comedy “A Day Without a Mexican” addresses the hypothetical situation of what would happen if all Mexicans disappeared for one day in California. While the film was a satire, its points were very accurate, showing the many negative consequences for the economy of a world without Mexicans: a mother can’t go to work because her Mexican nanny doesn’t show up; diners can’t eat at restaurants because Mexican cooks aren’t there; construction of homes and buildings stops because there are no Mexican workers, etc.

Use an inclusive researcher who employs in-culture research practices when interviewing people of color.

Inclusive researchers who understand other cultures know how to lead a rich conversation through respect and appreciation, which questions to ask (and not to ask) and know how to interpret the feedback in a way that is culturally relevant.

Inclusive researchers emulate the preferred way of communication of people of color. For example, when interviewing Mexican Americans in focus groups, a good practice is to give them more time to answer the questions. Many Mexican Americans are storytellers and we should not always expect that they will answer succinctly.

A sign of respect is using simple language to communicate and not interrupting them with serial probes, which will send the message that their answers are not good enough. A researcher who expects short answers and cuts off Mexican Americans will cause them to shut down or code-switch.

Code-switching happens when people of color act and speak differently to be accepted by whites and make white people feel comfortable. While moderating Hispanic focus groups, I saw bilingual

Examples of participants’ pain

- A Black female participant opens up in the research and feels judged by the researcher who did not understand what she really meant and made a hurtful comment.
- An Hispanic participant shuts down when a non-Hispanic researcher asks him to respond in a direct and succinct way that is comfortable for the researcher but not for the participant. This low-income and less-educated participant prefers to provide a more elaborate response instead of being cut off prematurely by the researcher.

Examples of clients’ pain

- End-client researchers and marketers receive an incorrect insight from the researcher. The company creates an ad that does not connect with people of color, wastes resources and potentially damages brand awareness and preferences. For example, I recall an ad targeting U.S. Hispanics that showed a grandmother who was hoarding cereal from her family, offending Latinos, who view grandmothers as nurturing rather than selfish.

Respect and appreciation

How can we remove self-bias? My top three ways involve creating respect and appreciation for people of color:

- Understand the history and culture of people of color to respect them and see them for who they are.
- Use an inclusive researcher who employs in-culture research practices when interviewing people of color.
- Generate insights that connect with people of color through their values.

Understand the history and culture of people of color.

The Hispanic and Black communities in the U.S. crave and deserve respect and appreciation. It is key to treat them with dignity and understanding during the research.

participants code-switch when a non-Hispanic researcher joined me at the end of the group to ask questions. They changed their friendly style to more direct English to mirror the non-Hispanic researcher.

The need for frequent code-switching has a negative effect on the well-being of people of color because it makes them think it's not safe for them to be themselves, which of course is the exact opposite of the atmosphere you want in your qualitative research.

If you want to know if participants are code-switching, here is a test. When a moderator leaves the focus group room, people of color should act the same way as if the moderator were still in the room. If they change their tone of voice or act differently, they were code-switching and the moderator needed to do more to allow them to be themselves.

Generate insights that connect with people of color through their values.

Inclusive researchers understand the values of people of color and strive to find real insights to create products and

brands that connect with them. Below are some examples:

Black culture values respect. P&G showed respect to the Black community through advertising with a Tide ad where a Black dad is helping his baby to sleep. Both in white t-shirts. The message of the ad was perceived by white women as "Tide gets the clothes clean." Black women had the same perception but with one difference: they felt respected by the ad because it showed a Black man as a caring father in a way that resonated with their own views and experiences. The ad ran in the Black and general markets very successfully. In November 2021, P&G's CMO Marc Pritchard said, "In the past year more than half of our sales growth in North America came from multicultural segments."

Mexican culture values family. Mothers are highly respected in Mexican culture and a good ad will show respect for family, mothers and traditions. For example, one Coca-Cola ad showed Mexican moms sharing a song and a Coke, reinforcing the ideas of tradition and that mothers are strong nurturers.

See them for who they are

Before your next research endeavor, I encourage you to: watch the "Widen the Screen" videos from P&G to get a sense of how self-biases affect your perceptions of what you see; read about the history of Mexican Americans, Black Americans and Asian Americans and learn about their cultural values, identities and preferred communication styles; consider hiring inclusive researchers who can treat people of color with respect and appreciation, understanding their cultural values, identities and preferred communication styles; and look for code-switching in your focus groups.

My hope is that you and your company would like to see people of color for who they are by providing an in-culture research experience that generates insights and drives results. By following some of the tips I've outlined here, you will be well on your way to doing just that. ①

Isabel Aneyba is the founder of COMARKA Research. She can be reached at ianeyba@comarka.com.

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Extraordinary potential, serious concerns

Five generative AI trends on CMOs' minds today

| By Steven Millman



abstract

CMOs expressed a number of AI-related thoughts at the 2024 Consumer Electronics Show, including privacy challenges with large language models, authenticity in AI-generated content and the potential for hyper-personalization in advertising.

If there's one thing about the 2024 Consumer Electronics Show (CES) in January upon which most everyone can agree, it's that 2024 was the year of AI. Carried on the back of the generative AI wave, AI was in just about everything this year – in toys, mobility assistance devices, software, financial tech, health care and literally every other category to be found.

The marketing world was no less affected by the AI fever circulating at CES and I had the opportunity to hear from and speak to a variety of chief marketing officers there and later about how their thinking on the subject has been evolving. Hopefully AI was the only fever circulating but when you put 130,000 people together in one place, you take your chances.

So what are CMOs thinking about the new AI revolution in the marketing space? Here are five major themes I heard from them over the week at CES.

PRIVACY CONCERNS ARE EXPANDING

CMOs are used to worrying about privacy, whether it's protecting their own customers, following relevant data privacy laws such as the California Privacy Rights Act (CPRA), the European Union's General Data Protection Regulation (GDPR) or handling sensitive health information.

The large language models (LLMs) that underlie generative AI models present new privacy problems that CMOs – along with the rest of the advertising ecosystem – need to manage. The privacy challenge from LLMs centers around the training data used to create these models. LLMs that are not very careful with what they choose to include in their training sets may easily ingest personally identifiable information (PII) that can resurface later in response to a prompt.

On the other side of the equation, PII may be inadvertently ingested into a LLM when included in a prompt – a serious violation of privacy rules – as many LLMs add user prompts directly to their training sets to



improve the models. There are already easy-to-find examples of both kinds of violations.

Finally, there is a new kind of hack frustrating LLMs. It's called injection prompts, which are hidden instructions placed on a webpage that a bad actor understands will be pulled into the training set for one or more of the larger models. Researchers have created injection prompts that have made major LLM chatbots start to speak like pirates or ask the person using them to provide bank account details.¹ Any of these kinds of privacy violations could create major havoc for a brand and result in potentially crippling fines.

HOW AUTHENTIC DOES THE CREATIVE FEEL?

In content marketing, brands are eager to engage with their audiences at a deeper level, to make their audiences feel heard and included and to build connections with people that feel personal and real. Authenticity creates both trust and credibility but it's very difficult to establish in practice. Consumers are discriminating and quick to discern fake or overly polished attempts by brands to connect.

While generative AI makes it easier to create new content at scale as you'll see below, there is a concern that overuse of these models in the ecosystem will make all content feel, more or less, like all other content, eliminating the opportunity to create the connection with the consumer to which they aspire. This lack of perceived authenticity could actually turn consumers off to these brands, decreasing engagement with their most coveted audiences.

SPEEDING UP THE CREATIVE PROCESS

All the CMOs I heard from appeared to agree that generative AI as it exists today cannot replicate the kind of creativity that humans are able to produce; therefore, the central role of the content creator in the marketing process is not at imminent risk of replacement as many fear. That said, these tools do present those creators with valuable tools which can speed up the creative process and greatly enhance the scale of production.

We have all faced at some point the "blank-page problem" – staring at a empty screen or canvas and not knowing where to begin. Generative AI can be an effective assistant in kicking off the creative process by simply writing a prompt that asks the LLM to provide a list of options.

Consider this hypothetical example I posed to Google's Bard:

I am building a new ad campaign for a new electric car called the Whizzer. This electric car differentiates itself from its competitors in that it is sportier, has faster acceleration and better range. We want the ad to drive consideration of our brand for people thinking about buying their first electric car. The audience target is ecologically minded adults with no children aged 25-45 who own their own homes. Please provide two different messages for this ad campaign.

Here is Bard's response:

Unleash Your Green Speed

Headline: "Eco-Warrior with a Need for Speed: Introducing the Whizzer."

Visual: Show a sleek Whizzer tearing through a winding coastal road, leaving a trail of leaves instead of exhaust.

Message: "Reduce your carbon footprint without sacrificing the thrill of the drive. The Whizzer's sleek design, lightning-fast acceleration and extended range let you zoom past expectations – and gas stations. Leave the boring hybrids behind and rediscover the joy of driving, guilt-free."

Charge Up Your Lifestyle

Headline: "The Whizzer: Power Your Life, Not Your Emissions."

Visual: Showcase a montage of a young professional using the Whizzer for various errands, charging at home and enjoying leisure activities.

Message: "Live sustainably without compromise. The Whizzer seamlessly integrates into your dynamic lifestyle. Power your morning commute, fuel your workday errands and charge up for weekend escapes – all from the comfort of your own home. The Whizzer isn't just an electric car, it's an extension of your conscious, connected life."

While neither of these message campaigns are nearly polished enough to be ready to use in this form – although I'm personally quite taken with the idea of leaves coming out of a non-existent tailpipe – they do have the ability to inspire a creator to start thinking about versions and variations that may resonate with their audience, greatly reducing the time necessary to generate the new copy.

If these did not inspire, the creator could simply ask the LLM for five more ideas. Or 10. Or 20. It is similarly simple to iterate on an idea by creating the copy you want and then asking the LLM to give you a version that was directed to men, or to the older age range, or to certain races or geographic residences. LLMs can help creators craft variations on their ideas at speeds that would have been unthinkable just two years ago.

HYPER-PERSONALIZATION OF ADS

With generative AI tools, it may become possible to not just create new versions of ads for different segments quickly but to deliver unique ads to individual consumers based on demographic and other data already known about them. This is something that has many of the CMOs I spoke with very excited about the future.

In today's digital and connected television advertising, the ad delivery systems already go through a process of selecting the most appropriate ad for a given device or household based on what is known about them in their identity graphs. For example, a lipstick brand may not want to waste its ads on men or an arthritis drug brand on an 18-year-old.

Several large advertisers are currently experimenting with the idea that an ad could be modified in real time to suit the characteristics known or believed to be true about the consumer it is being targeted at. A base ad creative could be modified on the fly as it is delivered by placing the generative AI tool in the same workflow as the ad selection process. The technology isn't there yet, and speed is still an issue, but this capability could be coming sooner than one might think.

ORGANIZATIONAL GOVERNANCE OF GENERATIVE AI

Another area of broad agreement among CMOs was that a new organizational model needs to be developed to oversee gen AI initiatives. It is no longer supportable in their minds for the leadership of gen AI to be verticalized into single organizations like technology, product or data science.

Another area of broad agreement among CMOs was that a new organizational model needs to be developed to oversee gen AI initiatives. It is no longer supportable in their minds for the leadership of gen AI to be verticalized into single organizations like technology, product or data science.

In order to be successful, there was a great deal of support for the creation of cross-functional teams that combine not only the expertise from the groups above but also marketing, operations, legal and potentially more. This collaborative approach fosters the sharing of ownership and accountability across different functions and ensures all stakeholders are heard. Several CMOs took it a step further and encouraged

the creation of centers of excellence to serve as centralized knowledge hubs for expertise, best practices and resources. Teams across the organization would be able to then tap into this expertise for their specific needs.

Regardless of how the governing organization is formed, each of the CMOs indicated that a generative AI lead should be selected to serve as a dedicated specialist, spearheading prioritization and implementation across various functions. This requires finding the right individual with a diverse set of skills and experience who may already exist in the organization or who may need to be hired from outside.

Ignited the marketing world

The generative AI revolution over the last few years has ignited the marketing world, sparking both extraordinary potential and very serious concerns. From lightning-fast creative sprints to hyper-personalized ads, AI promises to transform how CMOs engage with their audiences while at the same time forcing them to navigate a complex and sometimes opaque series of new risks.

A balance needs to be developed to amplify human creativity and productivity with these new AI tools while at the same time safeguarding privacy and preserving brand authenticity. AI-savvy CMOs who can walk this line are going to do extraordinary things for their brands in 2024 and potentially change the way we think about marketing into the future. 📌

Steven Millman is global head of research and data science at Dynata. He can be reached at steven.millman@dynata.com.

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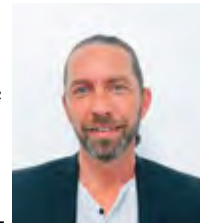


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Not sold on buying clothes online

Before the normalization of online shopping, many questioned whether it was realistic to purchase clothing via the internet. A March 2000 Survey Monitor entry ("Online apparel shopping hits snags") stated, *"There are still some serious barriers to overcome before apparel shopping over the internet is fully accepted."*

According to an E-BuyersGuide.com survey, conducted in January 2000, 28% of respondents didn't buy clothing online because they did not trust the sizing accuracy and 18% worried about the return process. Brand or store familiarity (28%) and the e-retailer having a traditional store (10%) were not as important as low prices (52%) and free delivery (46%). Unsurprisingly, 34% of respondents believed e-mail promotions and click-through advertising banners (16%) were more successful compared to the traditional newspaper (3%) and radio (2%) advertisements.

Case study: Chevron's People Do campaign

The March 2000 article "Chevron tracks long-running corporate advertising program," dove into Chevron's "People Do" campaign, which highlighted its attempts to preserve and protect the environment. Chevron created advertising campaigns with effective messaging using specific examples of the environmental good it did. *"It's interesting that things we spend an awful lot of money to do – such as making our refineries more environmentally friendly – if you try to advertise them, consumers don't give you as much credit as some less-expensive thing you might do to convey your concern,"* said Lewis Winters, manager of opinion research, Chevron Corporation.

While establishing the right approach and message was crucial to the effectiveness of the campaign, credibility in this type of advertising was the critical component. According to Jack Moore, president of Carmelita Inc., "Most people are not prepared to believe statements from oil companies. If the oil company comes out and says, 'We love the environment,' there is a tendency to reject it. But if they come out and say, 'Here is something very specific we did,' the interest in the case itself brings people into it."

2000



The 'underhyped' internet

The same issue contained an article titled "Advantage: internet – Add online focus group viewing to the list of benefits the Web offers researchers," which pointed to some of the internet-based advantages the marketing research and insights industry saw. The first two were flexibility and convenience, followed by streaming media. The article explained streaming media and argued that it isn't about quality, since video compression often distorted the audio and decreased its clarity, but about access. A New Yorker could watch video content from a conference that happened earlier in the day in Los Angeles. "The pictures may be fuzzy and the sound occasionally garbled.

But when a Web user clicks on that link and gets media on-demand, that is power." Streaming could greatly impact the industry, allowing researchers to not only view focus groups, virtual conferences and industry events from the comfort of their homes but also participate and communicate with others in real time.

The piece correctly predicted the next 20+ years, stating, "You have probably heard so much about the internet that you are tired of the hype. But *the internet is going to have such a profound difference in the future that it is, in fact, probably underhyped.*"

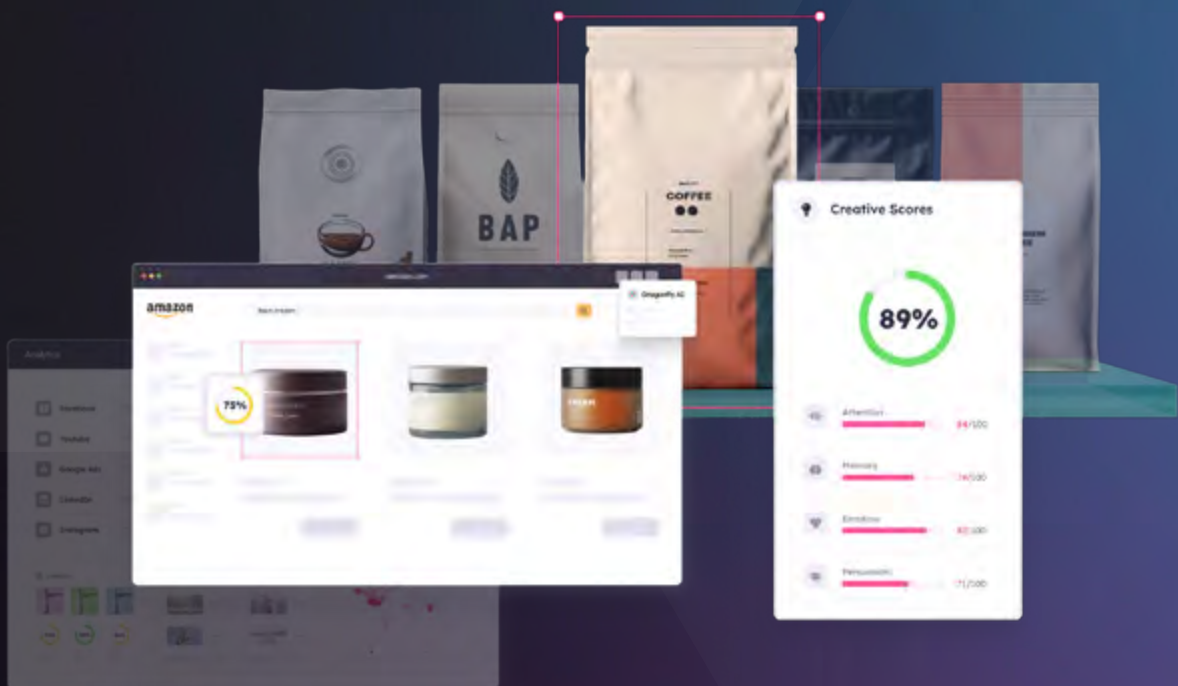
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CALENDAR OF EVENTS

●●● can't-miss activities

Merlien Institute will host Qual360 NA on **March 13-14**. Visit <https://na.qual360.com>.

IQPC will host the Chief Data Officer Exchange on **March 18-19** in **London**. Visit <https://www.aidataanalytics.network/events-chief-data-officer-exchange>.

IQPC will host GenAI DACH on **March 18-20** in **Berlin**. Visit <https://www.aidataanalytics.network/events-generative-ai-dach>.

WBR will host eTail Germany on **March 19-20** in **Berlin**. Visit <https://etailgermany.wbresearch.com>.

NMSBA will host the Neuromarketing World Forum on **March 20-21**. Visit <https://www.neuromarketingworldforum.com/>.

IQPC will host Customer Analytics Exchange on **March 19-21**. Visit <https://www.intelligentautomation.network/events-customeranalyticsexchange>.

ARF will host AUDIENCExSCIENCE Conference on **March 20-21**. Visit <https://thearf.org/arf-events/audiencexscience-2024-call-for-content/>.

MRS will host CX | UX | MR Conference on **March 21**. Visit <https://www.mrs.org.uk/event/conferences/cx-ux-mr-conference-2024>.

The Research Club will host the Quirk's Chicago Pre-Event Networking Mixer on **March 25**. Visit <https://theresearchclub.com/events/chicago-quirks-pre-event-networking-mixer/>.

Quirk's Media will host The Quirk's Event – Chicago on **March 26-27**. Visit <https://thequirksevent.com/chicago-2024/>.

IQPC will host the Customer Show Asia on **March 26-27** in **Singapore**. Visit <https://www.cxnetwork.com/events-customershowasia>.

Corinium Global Intelligence will host CDAO Canada on **March 27-28** in **Toronto**. Visit <https://cdao-canada.coriniumintelligence.com>.

ESOMAR will host ESOMAR Latin America on **April 7-9**. Visit <https://esomar.org/newsroom/latin-american-call-for-speakers-2024>.

Insights Association will host its Annual Conference on **April 8-10** in **Atlanta**. Visit <https://www.insightsassociation.org/Events/Upcoming-Events>.

Intellus Worldwide will host the Intellus Worldwide Summit on **April 10-12** in **Chicago**. Visit <https://www.intellus.org/Events-Webinars>.

Nordic Growth Summit will host the Nordic Growth Summit on **April 11**. Visit <https://nordicgrowthsummit.com>.

Corinium Global Intelligence will host CDAO Singapore on **April 16-17**. Visit <https://cdao-sg.coriniumintelligence.com>.

Quirk's Media will host Quirk's Virtual – Research Collaboration on **April 17**. Visit <https://www.quirks.com/events/quirks-virtual-research-collaboration>.

UXinsight will host the UX Insight Festival on **April 15-17**. Visit <https://uxinsight.org/ux-research-conference-festival-2024/>.

Pharma Ci Conference & Exhibition will host its Annual Conference on **April 16-17**. Visit <http://pharmaciconference.com/europe/>.

GreenBook will host IIEX North America on **April 17-18** in **Austin**. Visit www.greenbook.org/mr/events/.

Merlien Institute will host MRMW APAC on **April 17-18** in **Singapore**. Visit <https://apac.mrmw.net>.

Council for Advancement and Support of Education will host the Nordic Summit on **April 17-18**. Visit www.case.org/conferences-training/nordic-summit-2024.

Event details as of January 29, 2024. Please see websites for more details.

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10 minutes with...

Nici Nelson

Director of Activewear Consumer Insights, Hanes

Could you describe your background and how your varied job experiences – from a buyer at Macy’s to a category manager at Hanes – guide your current role in consumer insights?

First, I am so glad to hear that you think people with different backgrounds and career paths would be of interest to others in insights.

I was a buyer at Macys, then started in sales at Hanes and moved around at Hanes to category management, product marketing and now consumer insights. There are three common threads through all these jobs – understanding the business, building relationships and communicating effectively.

I think knowing the challenges and goals for both sides of business, the retailer and the wholesaler, helps me execute work that is valuable and impactful. And, to have an impact, you need trust. Building relationships with your stakeholders is necessary. Finally, effective communication – clear and concise – will ensure your ideas are understood, you are using everyone’s time effectively and there is no confusion.

Who – or what – has influenced your career the most?

Oh goodness. I truly think of my career as building blocks. Everyone I have worked with and everything I have worked on has built up my strengths and has helped me address my weaknesses. However, if I had to pick one thing, it would probably be reading Sheryl Sandberg’s book, “Lean In.” It was empowering to be told we [women] need to claim a seat at the table and not assume the back row. It helps illustrate that success as a female in business does not have to look like a woman acting as a man.

When looking ahead to the next five years, what do you think will be the biggest challenge for consumer insights?

Sample and AI. I am concerned that our traditional methods of surveys and sampling are boring, repetitive and may not uncover true behaviors. Also, I worry that our sample is not as representative as we expect it to be in panels.

AI is amazing. So powerful. I love the efficiency it can provide. My concern is not about the technology itself but if teams will be able to adapt and get on board with the many possible ways software suppliers will be able to implement and innovate around it.



“I truly think of my career as building blocks. Everyone I have worked with and everything I have worked on has built up my strengths and has helped me address my weaknesses.”

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





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