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For marketing research and insights professionals

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Award finalists announced

It's official! The 2024 finalists of the Marketing Research and Insight Excellence Awards have been announced. The finalists from all 17 categories represent the best in the industry after being chosen out of 219 nominations. Thank you, judges, for your help in selecting the top nominees! See the list of finalists at quirksawards.com.

The winners will be announced during a virtual award celebration on November 19 at 12 p.m. ET/5 p.m. U.K.

Register to attend for free at bit.ly/4d9fmM5.

// E-newsworthy

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••• shopper insights

Don't wait for AI to rescue online shopping

According to a survey by Capterra of over 5,500 global consumers, the abundance of choices – including fake reviews and too many sponsored results – makes shopping online difficult and time-consuming. And while emerging AI agents are poised to revolutionize the online experience by acting as virtual personal shoppers, there are a plethora of issues holding the tech back, like AI hallucination, concerns over data privacy and AI-washing.

Over half of global consumers expressed frustration with how frequently search engines return inaccurate and irrelevant results, while nearly a quarter (23%) struggled to determine the appropriate search terms or keywords to use in the first place. Additionally, 84% encountered difficulties when using online search filters, including incorrectly applied filters, a lack of specificity or having too few filters to meaningfully narrow results.

The keyword problem is exacerbated for shoppers influenced by social media trends, as they struggle to translate viral trends into retailer-friendly terms to generate relevant results, both on search results and individual retailers' websites. For instance, making the jump from the "quiet luxury trousers" you saw on Instagram to the "off-white linen blend pleated high-waist trousers" listed on a retailer's website isn't exactly intuitive.

Retailers waiting for an AI solution to improve the customer experience are missing out on the opportunity to better serve their audiences now through existing technology like software for review management, social media monitoring or enterprise search, says Capterra's Senior Retail Analyst Molly Burke.

••• the business of research

Start small with diversity efforts

When companies are assessing their diversity efforts, it's important to consider the size of the groups they are looking at, according to findings presented in a recent Organization Science article, "Group size and its impact on diversity-related perceptions and hiring decisions in homogeneous groups."

Studies conducted for the article confirmed that people are more likely to notice when everyone looks the same in a large group than a small one and flag it as a problem, prompting them to take action to diversify it. "Bigger groups that lack diversity raise more speculation," says article co-author Aneesh Rai. "People assume they are more likely to have resulted from an unfair selection process, see them as less diverse and more likely to face diversity-related reputational concerns."

For managers and decision makers, the key takeaway from the research is to not ignore smaller teams that lack diversity. Those are the teams where diversity is more likely to be neglected and managers must recognize that potential blind spot and take action accordingly. "If you fix it now, you're less likely to face reputational consequences later," says Rai. "We're highlighting this problem for small teams so organizations can nip it in the bud now and not run into issues down the line when those groups grow."

By Joseph Rydholm, Quirk's Editor

At 2024 Quirk's Events, quality ruled the dais

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Joe Rydholm can be reached at joe@quirks.com

The end of summer/arrival of fall means that our 2024 slate of Quirk's Events is in the rearview mirror. It always feels odd to be done with them. Our small-but-mighty team stays so focused on organizing and staging everything – in addition to doing all of our other tasks – that when it's all over, we almost don't have the energy to celebrate.

But celebration is certainly warranted!

While the data is anecdotal and qualitative, I think our New York event in July was possibly our best ever. (It was also our biggest and best-attended, drawing a record number of client-side researchers!) I bring that up not to crow but because to me it was a rewarding validation of our decades of work on emphasizing the delivery of quality information to our audiences across our print, digital and in-person products.

I haven't analyzed the session review data yet but based on the feedback I and other staffers heard, and based on our own experience attending the sessions, it felt like presenters did an especially great job of keeping their talks substantive, useful and relevant.

In theory, that's what all conference speakers strive for but in practice over the years I have seen many instances at our events and those of other organizations where presenters seemed focused on the opposite goals. Whether because of ego or inexperience or, in the case of a vendor or agency session, pressure from the marketing team or higher-ups to use their 30 minutes before a captive audience to SELL SELL SELL, that approach does nobody any good. Attendees have their time wasted and speakers risk alienating a roomful of peers, colleagues and potential customers.

That's why we came up with the Quirk's Q-Mandments, a list of 10 best practices that we urge presenters to abide by. Examples include:

Thou Shalt Be Relevant: During no part of your presentation should you ever sell your company, services or products.

Thou Shalt Be Interesting: Explore new industry territory and present ideas you haven't seen or shared before.

Thou Shalt Be Engaging: Deliver your presentation with clarity, gusto and actively engage your audience.

As with the biblical commandments that inspired them, they are suggestions and people freely disregard them (though without any threat of eternal damnation, at least as far as we know). I handle a lot of the client-side speaker recruiting and also vet the vendor-side sessions and you never actually know how a speaker will do until they get up there and start talking. Some people I have been sure would be great have not been and others I have worried about have knocked it out of the park. But across all of our events this year and in New York especially it was gratifying to see our insistence on quality paying off and finally getting through, in effect raising the bar for all presenters to avoid standing out with a subpar effort.

The one blemish, if I can call it that, was an increase in client-side researchers going a bit over the top in praising the companies of their vendor-side co-presenters during some vendor/client sessions. Perhaps they were coached/asked to do this or were just trying to do right by their vendor friend. Or maybe they're just so happy with the vendor that they can't help themselves. To be sure, it's better for those sentiments to come from the clients but they still end up sounding to some audience members like commercials, based on the attendee comments I overheard afterwards.

Do it all over again

The thing about having such a great series of events is that you have to do it all over again – and (hopefully) do it better! That takes time and effort so we are already starting the client-side speaker recruitment process. Here are the 2025 Quirk's Event dates and locations (next year we will be back on the West Coast, swapping 2024 site Dallas for Burbank, Calif.): Los Angeles (February 26-27); Chicago (April 2-3); London (May 7-8); New York (July 23-24).

If you are a client-side researcher, I hope you will consider speaking. It's a great way to meet new peers and colleagues and reconnect with those you already know. In exchange for presenting you'll receive full-conference passes for yourself and your in-house research team. Sessions are just 30 minutes. Your presentation can be on just about anything related to the insights profession. I'm happy to help you develop a topic. Reach out at joe@quirks.com and let's get to work!

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

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

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

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

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

#facetofacemrx

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

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

QUIRK'S IN FOCUS

A digest of survey findings and new insights for researchers

••• b2b research

Woe is not necessarily me

Business owners confident despite challenges

Almost half of all business owners surveyed in May expect interest rates to increase in the next six months, highlighting mounting economic concerns, according to a study by Nationwide. The majority of small business owners (72%) and middle-market business owners (51%) rate the current condition of the U.S. economy as "poor" or "fair," with inflation topping their list of concerns at 61%. Following closely behind are worries about the upcoming U.S. presidential election (49%), high interest rates (49%) and supply chain disruptions (40%).

Despite these and other economic uncertainties, many business owners have a brighter perspective when considering their own businesses, with small (51%) and middle-market (73%) owners rating the economic environment for their own business as "good" or "excellent."

In addition to macroeconomic concerns, owners face pressure from workers who are experiencing economic strains and are demanding more from them. In the last six months, 37% of all business owners experienced employees asking for better compensation, more or better benefits (32%) and employees leaving for a better paying job (28%).

Business owners are adopting a proactive, hands-on approach to improving their company's resiliency and to meet the evolving needs of their staffs. They're implementing measures to mitigate risk and handle unforeseen circumstances. Fifty-three percent of small business owners and 66% of mid-market business owners are proactively planning for a potential crisis. Forty-one percent of small and 63% of mid-market business owners are implementing or updating their business continuity plans and 31% of small and 59% of mid-market business owners are making structural repairs or improvements to their building/property. Over half of small (65%) and mid-market (75%) owners feel prepared to navigate potential disruptions like a weather or financial event.

Furthermore, business owners say they are investing in their workforce by providing additional benefits, such as increased compensation and improved retirement offerings. More than half (59%) of small and 80% of mid-market business owners are planning to or have already increased wages. Thirty-two percent of small and 74% of mid-market business owners are planning to or have already improved retirement offerings.

Most business owners feel they are on track when it comes to being financially prepared for retirement. Nevertheless, 57% of small and 32% of mid-market business owners also report that within the last 12 months, they have pushed back their retirement timeline because they're worried that they haven't saved enough. Forty percent of small and 20% of mid-market owners have had to reduce the amount they save due to current economic conditions. Meanwhile, over 40% of all respondents reported that they are delaying retirement because they enjoy working.

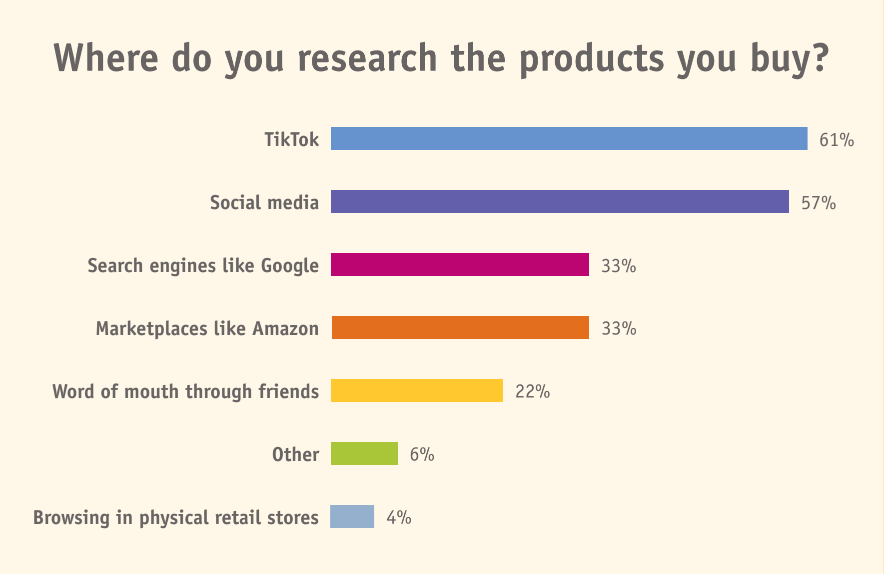
When it comes to retirement, not all business owners have a clear succession plan in place. Only 30% of small business owners have a succession plan compared to 62% of mid-market business owners. Among those small business owners without a succession plan, almost one in four (24%) say they plan to close the business permanently. When asked what advice they would most want to give their younger selves about planning for retirement, 52% of small and 39% of mid-market owners said they would start planning earlier and 47% of small and 42% of mid-market owners would save more consistently.

Nationwide commissioned Edelman Data and Intelligence to conduct a nationally representative online survey of 400 U.S. small business owners, 400 mid-market business owners and an oversample of business owners ages 60-65 nearing retirement (n = 100) from May 1-15, 2024.

••• shopper research

Not sold on the experience

Consumers demand more from online shopping



Amid a proliferation of purchasing options and budget concerns surrounding sustained inflationary pressures, online retailers are struggling to meet rising consumer expectations around the globe, according to integration and automation platform Celigo. There's a significant difference in online shopping sentiment across generations. While one-third of Baby Boomers across the globe reported flawless online shopping experiences in 2023, Gen Z, which will gain $2 trillion in purchasing power within the decade and emerge as the most dominant shopping demographic, reported the greatest dissatisfaction with online shopping. In fact, 92% of Gen Z respondents in the U.S. and 85% in the U.K. had at least one negative online retail transaction within the past year.

In addition to disappointing shopping experiences in 2023, the research also exposed the most important qualities consumers seek in online retailers, how they research and buy products and their spending intentions for the upcoming 2024 holidays. Consumers listed convenience (52%), greater access to product offerings (48%) and lower prices (34%) as their primary reasons for shopping online as opposed to brick-and-mortar retail stores. U.S. shoppers cited lower prices (59%), free shipping (53%) and fast shipping (33%) as the three most important offerings when choosing an online retailer. Conversely, the top reasons consumers would cease the buying relationship with a vendor were receiving products that do not accurately match their descriptions (39%), excessive shipping costs (38%) and late deliveries (32%).

Seventy-one percent of respondents say they will spend just as much or more online during the 2024 holiday shopping season than they did in 2023 with 53% saying they plan to participate in a Cyber Monday or Black Friday event. Forty-three percent of respondents stated that inflation and higher prices have led them to shop online less because they need to tighten their budgets. On the other hand, 31% say that inflation has caused them to shop online more because they find better deals there.

Sixty percent of consumers rely heavily on product reviews found on retailers' websites when making their final purchasing decision, while 41% turn to third-party review sites. Discerning shoppers are scouring the internet for the best deals and products, with 35% saying they research multiple retailers and more than 20% turning to marketplaces such as Amazon or eBay to compare pricing options. Twenty percent say they go directly to the websites they trust to complete purchases and 14% prefer to visit physical stores before purchasing a product online.

In the U.S. and the U.K, more than half of Gen Z shoppers rely on social media (57%) and TikTok (61%) to research the products they buy. Thirty-three percent choose Amazon as their research method while 21% rely on word of mouth and friends.

Celigo surveyed 1,506 respondents from the U.S. and U.K.

••• restaurant research

Dining in an age of inflation

‘Can I box that up for you?’

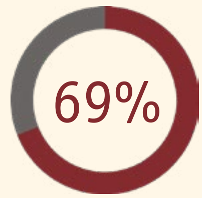
With dining costs on the rise, Americans are getting creative to save a few bucks when eating out, according to research from Lightspeed Commerce. Fifty-one percent of respondents say they will either continue to dine out at the same rate or increase going out in the next six months. That being said, consumers are certainly looking at how best to stretch their dollar as seven in 10 (69%) diners report higher meal prices and four in 10 (39%) notice their favorite dishes are shrinking in size – a phenomenon commonly referred to as shrinkflation.

With 81% of respondents dining out at least once a month and 39% dining out once a week or more, Americans are looking for ways to keep dining fun and affordable and they are pulling out all the stops. A savvy 43% are hunting for deals with coupons, 39% are choosing value meals and 36% are making the most of happy-hour specials.

Nearly half (45%) of respondents are not shy about asking to box up their food to stretch their dining dollars. Interestingly, 53% of women compared to 38% of men are more likely to enjoy a second meal with the leftovers. Older Americans, particularly those aged 55 or older, are similarly inclined, with 53% taking doggy bags home. Diners in Los Angeles appear more conscious about food waste, with 51% requesting leftovers to go.

Tipping continues to be a hot topic in the quest to save money when dining out. A whopping 73% of diners are not fans of automatic tipping prompts on digital screens, with 58% saying they feel pressured to tip more than they'd like, often to avoid appearing stingy. Inflation has affected the amount diners are willing to tip, according to 44% of survey respondents and more than half (55%) in the 18-34 age group. However, most restaurant goers remain generous with 38% saying they tip between 16% to 20%, 34% opting for 10% to 15% and 13% tipping 21% or more. Interestingly, for scenarios outside of the normal tipping etiquette, survey respondents were overwhelmingly supportive of tipping delivery drivers (61%), not so much for coffee shops (28%) or ordering at the counter (19%).

The backlash against QR code menus is palpable. While 20% of respondents appreciate their hygiene benefits, nearly nine in 10 (89%) would rather flip through a physical menu, especially at fine-dining spots, where this jumps to 94%. Thirty-four percent say they downright “hate” QR code menus and a quarter (25%) grumble that the text on digital menus is just too tiny to read.

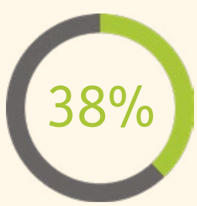


Of diners report higher meal prices

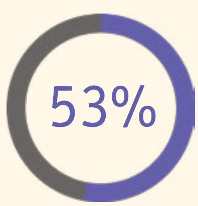
The disdain for QR codes is more pronounced among the older generation, with 62% of those aged 65 and above requesting a paper or printed menu when presented with a QR code by a server. Additionally, 32% admit to not being tech-savvy enough to navigate QR code menus.

Lightspeed conducted this survey throughout May 2024 using survey vendor Medallia. Over 7,500 anonymous responses were collected globally, distributed among the following countries: Canada (1,500 respondents), U.S. (1,500), U.K. (1,000), Germany (1,000), France (1,000), Netherlands (1,000) and Belgium (1,000). Respondents were required to be over the age of 18 and have attended a sit-down restaurant within the last six months.

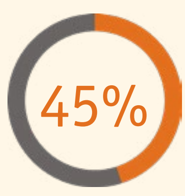
Key takeout takeaways



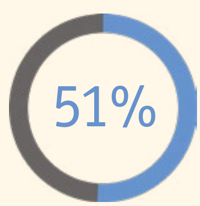
Of men enjoy a second meal with the leftovers



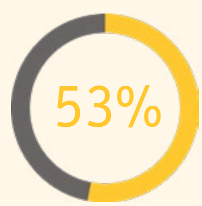
Of women enjoy a second meal with the leftovers



Are not shy about asking to box up their food



Of Los Angeles respondents take leftovers home



Of those aged 55 and older take doggy bags home

••• leisure research

Taking a slowcation

Travelers indulge in doing nothing

Jam-packed, fast-paced vacations are out and rest and relaxation are in, according to travel agency Scott Dunn. In 2024, Americans are prioritizing a gentler pace, with almost two-thirds (60%) traveling specifically to de-stress and slow down.

Slow travel embraces switching off, detaching from everyday life and taking each day as it comes. When asked what they do to relax on vacation, over half of respondents pointed to going out to eat and grabbing drinks (52%). Almost half find comfort in spending time outdoors (47%) and many enjoy going on excursions (26%) while 44% use their vacation time to "do nothing" or to catch up on sleep (35%). Forty-three percent enjoy socializing with loved ones, 29% would rather pick up a book, 27% choose to sunbathe, 26% listen to music or a podcast and 24% use the time to watch TV or films.

Spending time outdoors is popular as Americans say Mother Nature helps them relax while on vacation. This comes as no surprise as studies show that spending time in nature is an antidote for stress. Despite the desire to relax, there's still a demand for cultural exploration as three in 10 want adventure and excitement this year. However, the research reveals that Americans aren't exploring as much as they used to, in a go-go, pre-arranged way. Instead, they are drawing out their travel plans for as long as possible, savoring each moment and adopting a "go with the flow" attitude.

It takes Americans three full days to switch off while on vacation, although those who regularly check their smartphone (and e-mails) may find it takes them even longer to unwind. Fifty-six percent say they could not go on a vacation without their smartphone and 31% admit they couldn't last more than a few hours without checking their work e-mails while traveling. A separate Scott Dunn survey revealed that 41% plan to take longer vacations this year, suggesting they crave more rest, a slower schedule and more time to relax.

This survey was conducted with 2,000 U.S. adults.

••• financial research

Got my mind on my money…

Brits obsess over banking apps, balances

Widespread financial anxiety among U.K. consumers has led to a phenomenon known as "financial doomscrolling" – a term describing the excessive monitoring of account balances and banking apps. Amid a period of political and economic uncertainty, FinTech company FIS found that 51% of consumers are "obsessed" with checking their financial apps, with 63% of Gen Z and 64% of Millennials engaging in this habit.

The research explored how different generations – from Generation Z to Baby Boomers – are thinking about their finances, as well as the tools they use to manage them across the money life cycle. Financial concern is rife among U.K. consumers with 58% of respondents feeling "worse off" than they were 12 months ago. Thirty-five percent are struggling to save and 75% are unable to meet their financial goals due to inflation and the rising cost of living.

Tied to this trend, 45% of consumers say they think about their money and financial situation daily – typically around five times a day – while 37% check their current account balance daily. When asked why they are thinking about their money so frequently, 41% said they are worried about their financial situation and 47% are thinking about how to improve it.

Despite expressing a sense of financial doom and gloom, 68% said they are extremely or very satisfied with their primary bank. More than three-quarters (77%) of respondents are not likely to switch their primary bank in the next year, rising to 87% for Baby Boomers.

In a clear shift away from brick-and-mortar banking, over eight in 10 people surveyed are utilizing financial apps, with online banking and mobile wallets being the most common, and most consumers are unfazed by bank branch closures, with 79% claiming they have seen little to no impact. Strikingly, mobile banking is the top reason for every generation's loyalty to their primary bank. Overall, 56% of consumers listed mobile banking capabilities as a benefit of being a customer with their primary bank, rising to 63% for Gen Z.

Many U.K. consumers have struggled to save money in the past 12 months amid the cost-of-living crisis. Four in 10 respondents said they do not have funds to cover three months of living expenses and 35% have less than £500 in savings. Generation X are the least likely generation to have savings, with 27% revealing they have none whatsoever. Some are relying on credit, with 33% admitting to over £1,000 of credit card debt. Generally, more than half of those surveyed feel worse off now than they did a year ago and the outlook is pessimistic: 33% believe their situation will remain the same over the course of the next 12 months and 40% feel their situation will worsen.

Openly discussing one's financial situation is no longer considered taboo. The most common financial goal in the last 12 months was to say no to unnecessary spending as 48% of consumers embrace "loud budgeting" – a trend in which individuals vocalize what they can and can't afford and therefore hold themselves publicly accountable to living within their means. Sixty-one percent say they feel comfortable talking about their finances with family and friends. This sentiment increased to 67% of Gen Z, who appear in favor of a more open dialogue around money.

The survey was conducted by Savanta in April-May, 2024, with a sample of 2,008 adult consumers across the U.K., spanning Gen Z, Millennials, Gen X and Baby Boomers.

special advertising section

12 TOP GLOBAL RESEARCH COMPANIES

The world is more connected than ever, yet it is still challenging to find the right clients and respondents abroad. One of the factors to consider when choosing a research firm is its geographic reach. Your business may need to conduct research projects outside of your organization's home state or home country and by partnering with a knowledgeable global research company it is easier to have conversations with the world's consumers and overcome difficult cultural barriers, such as language translation, exchange rates and local customs that need to be understood in order to gauge their impact on the research process.

From translations to concept testing and strategy research, the following 12 marketing research companies can offer you services and guidance with any of your project needs.

Civicom® Marketing Research Services

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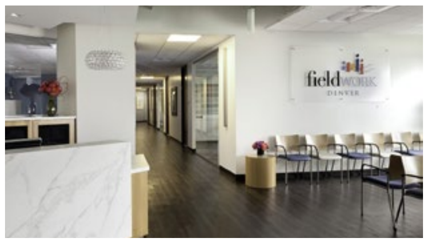

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12 grapes on New Year's Eve

| By Natalia Infante Caylor

abstract

The increasing economic power and cultural diversity of Hispanic consumers demand that brands rethink their marketing approaches to connect genuinely and respectfully with this influential segment.

As the U.S. becomes even more diverse, Hispanic consumers represent a growing force with $3.2 trillion of economic output (2023 U.S. Latino GDP Report) that brands cannot afford to ignore. This youthful segment is the largest minority in the U.S. and is projected to pass the 111 million mark (Statista, 2024) by 2060. As the white population ages and the Hispanic population increases (U.S. Census, 2024), brands that fail to recognize this shift risk being left behind in the race for market relevance.

Companies need to rethink their marketing efforts and understand that what works for the general market won't work for Hispanic consumers. Rather, marketers must engage with consumers in a genuine, culturally relevant and respectful way. And remember: The Hispanic market is not a monolith. Even though they all share the same native language, these consumers come from 20 countries and represent a range of dialects and unique regional nuances.

UNDERSTANDING YOUR AUDIENCE

First-generation Hispanics are those born outside of the U.S., second-generation Hispanics were born in the U.S. but have parents who were born abroad and third-generation Hispanics are those with two U.S.-native parents (U.S. Census, 2021). Usually, the more acculturated they are, the more they assimilate into the American culture and the English language. But that does not mean that a marketing campaign would resonate with all of them the same way.

For instance, a first-generation unacculturated Argentinean speaks a Rioplatense Spanish whereas a first-generation unacculturated Cuban speaks a Spanish with a Caribbean influence or dialect. There are slight variations among each of their versions of Spanish such as the vocabulary, tonality and accent that are important to recognize. Keeping this mind can help brands better understand their audience.

DIVERSITY OF COUNTRY

While most Hispanics living in the U.S. are Mexicans or of Mexican descent, other areas of the U.S. reflect the influences of Hispanics from different Spanish-speaking countries and therefore their behavior and needs as consumers might be different. For instance, the southern part of Florida has been known for having a heavy presence of Cubans and Puerto Ricans. However, with the changing demographics we are also seeing more Colombians, Venezuelans and other Hispanic groups.

ADVERTISING AND MARKETING

Do you go with hola or hello? What is a Hispanic consumer's language of preference when it comes to marketing? They may be comfortable speaking English but perhaps seeing a Spanish word or two might help them feel more connected. No matter what, making sure ad copy is accurately translated and culturally relevant for the target audience is critical to showing that you respect the Hispanic culture. The last thing you need is for your brand to convey the wrong message.

Beyond advertising, engaging with the Hispanic community through sponsorships, event hosting and supporting celebrations (such as National Hispanic Heritage Month, local Hispanic festivals, etc.) is a good way to gain visibility for your brand or organization.

Another way to connect with Hispanics is to become familiar with their important cultural traditions. For example, did you know that most Latinos eat 12 grapes at midnight on New Year's Eve? Each grape represents one month of the coming year and by eating one grape at a time and making a wish it is believed to set the year into a positive start.

I am a native speaker of Spanish and prior to becoming a market researcher I was a professor of multiculturalism and Spanish languages and cultures at several universities in Colorado. I remember living in northern Colorado, trying to track down grapes for New Year's and having to visit a couple of supermarkets to do so – not fun during cold, icy weather. About three years ago, my husband and I decided to finally escape the Colorado winter and celebrate the new year in South Florida. What a difference! We spent a few days near Calle Ocho, in Little Havana, well-known for its Cuban neighborhoods. The Latino population and diversity there compared to northern Colorado was pretty impressive of course and I had no issues finding grapes at the supermarket or any other type of Latino products to receive the new year!

Grapes are not the only solution: Other Latin Americans also eat lentils for New Year's as a tradition to symbolize prosperity and good fortune. It just takes getting to know your Hispanic audience to successfully integrate your marketing in a culturally sensitive way.

One more thing about translation and language to keep in mind is that we have formal Spanish used in professional or respectful contexts and informal Spanish used in casual or familiar settings. I have seen marketing campaigns in Spanish where the formal and informal Spanish were used interchangeably. As always, there's a place for everything but when it comes to marketing communication, keep in mind that a poor translation reflects back on your brand

New peaks

By delving into and embracing a cultural perspective, you can unlock new opportunities for growth and connection with Hispanic consumers. It is time for brands to reconsider their strategy and explore how these insights can drive their brand to new peaks. Embrace this $3.2 trillion of economic might by discovering the transformative power of the Hispanic culture for your brand today.

Natalia Infante Caylor is president and CEO of Hola Insights. She can be reached at natalia@holainsights.com.

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Introducing two new scales for more comprehensive CX measurement

| By Michael S. Garver

abstract

To overcome a strong positive bias and negative skewness characteristic of traditional customer satisfaction measurement scales, the author proposes two scales to be used in addition to NPS and ACSI approaches.

More than 30 years ago, Peterson and Wilson (1992) authored an important article that called into question common measurement practices associated with customer satisfaction studies. They put forth results suggesting that customer satisfaction data have a strong positive bias that is negatively skewed and that customer satisfaction levels may thus be inflated and overstate the satisfaction of a customer base. Furthermore, they argued that the most common response is often the top scale point and that as a result these scales display little variation.

It is troubling that many of the same customer satisfaction scales that were employed in the 1990s are still prevalent today and the resulting customer satisfaction data is still positively biased and negatively skewed. Garver and Williams (2020) state, "Future research needs to examine measurement error and scale use bias associated with customer satisfaction data and researchers need to develop new scales and approaches to overcome these problems."

The purpose of this article is to examine two new measurement scales for CX research and to embed these new scales into a more comprehensive measurement system for CX researchers.

Insightful journey

During a CX research project where we implemented the Net Promoter question, we decided to follow up with customers who were classified as Promoters and Detractors to better understand their perspective. This was an insightful journey and the author continued this practice over a long period of time with customers in a variety of different product and service contexts, examining our own CX surveys as well as those created by other researchers to learn how customers use CX measurement scales to rate products and services.

The first thing we learned was that customers use measurement scales differently. While the majority of customers use the Net Promoter question according to its classification rules, many do not. For example, there were hard-grading customers who supplied a 7 response that would recommend the product. In contrast, there were easy-grading customers who gave a 9 response but only thought the product was good or average. An overarching theme was grade inflation, where a strong positive bias was present in many customer ratings. On a side note, there was a group of customers who did not recommend products or services no matter their level of satisfaction.

In our discussions, there were many customers who mentioned their ratings as a comparison to a standard of excellence. While customer satisfaction was founded on this notion, the most common standard was different than what is specified in the academic literature. Only a small percentage of customers discussed the standard as expectations or needs and no one ever discussed ideal as the standard of comparison.

Instead, the comparison standard employed by many customers was a historical "best ever" experience with a product or service. With our customers, comparing to expectations and the ideal was too abstract, whereas the "best ever" product was concrete and could be recalled in detail. This is NOT a "best other product" comparison on the same CX survey but instead a historical "best ever" product or service from their experience.

For example, a Promoter once commented that that he supplied a 10 rating because his emergency room visit was the "best ever" experience in a hospital setting. Another Promoter commented that he supplied a 10 rating because his truck was the best vehicle he had ever owned. A student gave a professor a top rating and commented that she was the "best ever" professor she had experienced over her college career. This same student later discussed other professors who received a top rating and were "one of the best ever" professors she had taken courses from.

In addition to extreme answer choices (best ever or worst ever), customers often made comparisons to the average product or service. When customers gave lower ratings, they often compared those products to average, above average or below average products in the marketplace.

The positive bias in ratings was real for many respondents. While many supplied a 9 or 10 overall rating, not all of those products or services were "best ever" or "one of the best ever." In fact, many products and services that received a 9 or 10 rating were just good or above average. In short, customers classified as Promoters were not all Promoters but instead a mixed bag of "best ever," good or above average products and services. The main question at this point became imperative: How do we better measure the overall customer experience?

Simply not relevant

Customers also discussed that many surveys asked too many questions that were simply not relevant to the customer experience. One customer said, "Instead of asking what is important to you, just ask about what is important to me!" For example, a customer had a "best ever" experience in a hospital emergency room because of the skill and compassion displayed by the nursing staff and doctor, along with a short wait time. He commented that when he took the hospital's CX survey, it asked him to rate 20-plus attributes that he did not notice or care about. Frustrated that the relevant attributes were overshadowed by the irrelevant ones, he never finished the survey.

Many customers wanted to focus on the attributes that needed fixing. In a similar vein, others wanted to call attention to the strengths and weaknesses of a product or service, highlighting their compliments and complaints. These customers wanted to streamline the process and provide feedback only on what was relevant to them in improving the product or service. Some customers wanted to give improvement suggestions instead of ratings.

Based on our discussions with respondents and examining the academic literature, we propose two new CX scales which we call the best ever scale and the stated improvement scale.

To make surveys easy to understand, researchers commonly use consistent question formats, a consistent number of scale points and consistent verbal scale anchors for measuring all CX attributes (Mackenzie and Podzakoff 2012). Researchers typically use verbal anchors such as, 1 means very dissatisfied to 10 means very satisfied, or 1 means poor to 10 means excellent. This consistency (scale points and verbal anchors) can lead to satisficing answers, where survey respondents may go into a passive mind-set and give responses with limited thought. Based on this finding, we have changed the number of scale points, anchors and the direction of our new scales to jolt survey respondents out their stupors.

BEST EVER SCALE

To overcome satisficing answers, the best ever scale utilizes a nine-point scale with labels only and no numbers. The question stem is similar but the answer choices are completely new. After testing many different answer choices, we decided on the scale shown in Figure 1.

Figure 1: Best ever scale

Overall, how does _________ compare to other _________?								
The worst ever	One of the worst ever	Well below average	Below average	Average	Above average	Well above average	One of the best ever	The best ever

The best ever scale is similar to previous scales in that the answer choices embed a comparison standard (exceeds expectations, very close to the ideal, etc.). However, the best ever scale embeds a historical best ever or worst ever comparison standard into the responses, one that was commonly put forth by customers. In addition to the extreme answer choices, it also embeds a comparison to the average product or service, something commonly discussed by customers.

STATED IMPROVEMENT SCALE

Amoo and Friedman (2000) found their improvement scale supplied lower ratings (decreased the positive bias) as compared to five other commonly used rating scales. Researchers have proposed improvement scales (Waddell 1999; Amoo and Friedman 2000), yet our stated improvement scale utilizes different response options. After testing a large number of answer choices, including those put forth by Waddell (1999), we decided on a five-point scale utilizing anchors as well as a midpoint, with a reverse ordering. These were all undertaken to limit satisficing responses. Our stated improvement scale has the answer choices shown in Figure 2.

The stated improvement scale has a reverse ordering, meaning that it starts with a positive response (no improvement needed) which is opposite of most other scales (Net Promoter, ACSI, etc.). At first, we were concerned that shifting the order might cause respondent error but after many tests, this has rarely occurred.

To examine these new scales, we statistically compared them to the Net Promoter question and the three American Customer Satisfaction Index questions (ACSI satisfaction, ACSI expectations and ACSI ideal). Given the measurement issues presented earlier, what characteristics would an improved CX scale possess? Consistent with Amoo and Friedman (2000), we believe the following characteristics would represent a better CX scale: lower satisfaction mean scores; fewer top-box responses; and a more normal distribution or a less negatively skewed distribution.

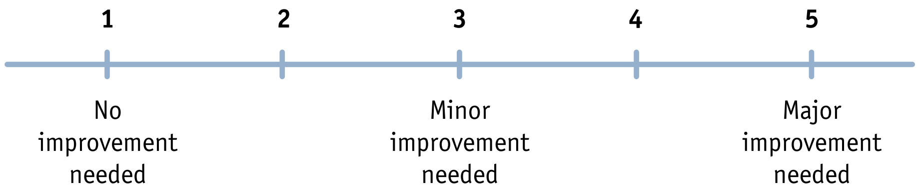

Figure 2: Stated improvement scale

The majority of our tests for the best ever scale and stated improvement scale have been with measuring CX attribute performance, yet we have also collected overall evaluations for these new scales in addition to the Net Promoter question and the three ACSI questions. We collected CX data from a sample of Gen Z in the domain of streaming TV and movie services. After selecting their primary streaming platform (Netflix, Hulu, etc.), we had the respondents provide overall evaluations utilizing six different rating scales for their primary streaming platform (sample size of 105).

CX measurement scales tend to have a positive bias, thus a scale that produces a lower mean score would be preferred. The mean scores for each scale are in Table 1. Because each scale has a different number of scale points (Net Promoter = 11, ACSI = 10, best ever scale = 9 and stated improvement scale = 5), we need to adjust the mean scores by their respective number of scale points to obtain a more comparable mean score. The stated improvement scale had a significantly lower adjusted mean score (.620) than the rest of the scales, which is consistent with prior research (Amoo and Friedman 2000). The Net Promoter and ACSI satisfaction question have significantly higher adjusted mean scores (.848 and .816). ACSI expectations and ACSI ideal and the best ever scale have similar adjusted mean scores (.706, .686 and .710). The stated improvement scale produces a lower mean score, demonstrating the least amount of positive bias.

CX measurement scales have too many top-box responses, thus a scale that produces a lower percentage of top-box responses would be preferred. The Net Promoter and ACSI satisfaction

Table 1: Comparing overall evaluation statistics

	Mean	Adjusted Mean by # of Scale Points	Skewness	% Top-Box
Net Promoter	9.33	0.848	- 1.571	35.2%
ACSI satisfaction	8.16	0.816	- 0.336	22.9%
ACSI expectations	7.06	0.706	- 0.539	5.7%
ACSI ideal	6.86	0.686	- 0.671	7.6%
Best ever scale	6.39	0.710	0.167	1.0%
Stated improvement scale	3.10	0.620	- 0.09	3.8%

scales have significantly more top-box responses (35.2% and 22.9%) than the other scales. ACSI expectations and ACSI ideal (5.7% and 7.6%) have significantly lower top-box responses than the Net Promoter and ACSI satisfaction scales. Lower still, the best ever scale (1.0%) and stated improvement scale (3.8%) have very low percentages of top-box responses.

CX measurement scales tend to have negatively skewed distributions, thus a scale that produces a more normal distribution would be preferred. A normal distribution has a skewness of zero. The Net Promoter question has a high level of negative skewness (-1.571). The three ACSI questions have moderate levels of negative skewness (-.336, -.539, -.671), yet well below the Net Promoter question. The stated improvement scale (-.09) and the best ever scale (.167) are much closer to a normal distribution than the other scales. While the stated improvement scale is closest to a normal distribution, the best ever scale produced a slightly positive level of skewness, a rare characteristic for CX measurement scales.

Based on lower mean scores, a lower number of top-box responses and more normal distributions, we conclude the best ever scale and the stated improvement scale perform better than the Net Promoter question and the three ACSI questions. The majority of our tests for the best ever scale and stated improvement scale have been with measuring CX attribute performance and these results are consistent with our findings across numerous studies. While the results are encouraging, more research is needed in a variety of other product and service contexts.

RECOMMENDATIONS

Let's begin with what we are not recommending. While our tests show that the best ever scale and stated improvement scale outperform the Net Promoter and ACSI questions, we recommend that researchers continue to use these benchmarks. The value of the Net Promoter and ACSI is being able to compare your offering's performance to industry averages and benchmarks, as well as comparing your performance to both direct and indirect competitors. Additionally, the value of tracking your performance over time cannot be overstated. We recommend adding the best ever scale and stated improvement scale in addition to your current practice to provide additional insight.

Some offerings lend themselves to gather best other-competitor ratings on their CX survey for both overall performance as well as attribute performance. If you can obtain best other-competitor ratings directly in your CX survey, then this represents best practice and the scales may or may not add significant value. However, many offerings do not lend themselves to capture best other-competitor ratings. For example, customers typically only use one computer, phone, automobile, word processor or tax service. In these situations, we recommend utilizing the best ever scale and stated improvement scale for both overall evaluations as well as attribute evaluations.

Comprehensive measurement system

Our recommendation is to implement our newly proposed CX scales into a more comprehensive measurement system in the following manner:

- Utilize the best ever scale and stated improvement scale for overall ratings, in addition to your current overall measurement scales.
- Utilize the best ever scale and stated improvement scale for attribute ratings in addition to your current attribute measurement scales.
- Limit the number of attributes in your CX survey to highly relevant, overall categories.
- For CX attributes, create an attribute index score that is comprised of your current scale as well as the best ever scale and stated improvement scale.
- Conduct key driver analysis with these attribute index scores.
- Implement a stated improvement analysis to complement your inferred improvement analysis (i.e., importance-performance analysis).

Implementing the best ever scale and stated improvement scale for overall and attribute ratings, in addition to your current measurement scales, is straightforward and easy. We suggest placing your current measurement scales before these new scales to minimize order effect bias. Academic researchers have always recommended three measurement items per attribute and this achieves this goal of a more accurate measurement system.

Limiting the number of attributes in your CX survey to highly relevant, overall categories is critical. While many readers will be loath to include more survey questions due to survey fatigue, this issue can be overcome if the attributes are highly relevant and important to survey respondents. Respondents lose motivation when the attributes are not relevant or important and they do not have the experience to answer the questions.

The next step in the process is to create attribute index scores. This can be done by simply adding up the three scores (best ever scale, stated improvement scale and your current scale) for each attribute. To make these index scores more intuitive, we recommend normalizing them to a 100-point scale, similar to the ACSI. To accomplish this, the researcher would create a new variable by adding the three scores for each attribute, then divide this number by the total possible number of scale points minus three. This number would then be multiplied by 100, which results in a 100-point scale for each attribute.

Key driver analysis (statistically inferred importance analysis) would then be conducted with the attribute index scores against a relevant dependent variable. The attribute index score should deliver more variation than single attribute scores, which will deliver more accurate key driver analysis results. We strongly recommend utilizing relative weight analysis for conducting key driver analysis. For more information on relative weight analysis and other best practices with key driver analysis, the interested reader should reference Garver and Williams (2020).

Many CX researchers examine attribute improvement opportunities via importance-performance analysis and we recommend this analysis as well. In addition, we recommend conducting a stated improvement analysis utilizing data from the stated improvement scale. Because this scale specifically asks about the level of improvement needed for each attribute, conducting a stated improvement analysis is an added benefit of this scale and a recommended step. A thorough discussion of this analysis is beyond the scope of this article, yet it can easily be accomplished by examining mean attribute scores in addition to conducting frequency counts for attributes needing minor through major improvement.

Overcome limitations

This research study presented two new measurement scales (best ever scale and the stated improvement scale) to overcome some of the limitations of traditional customer satisfaction measurement scales. Based on lower mean scores, a lower number of top-box responses and more normal distributions, we conclude the best ever scale and the stated improvement scale perform better than the Net Promoter question and the three ACSI questions. More importantly, we argue that these scales should be embedded into a more comprehensive measurement system for CX researchers.

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Innovate globally, communicate locally

How does a country's cultural profile influence consumer responses to new products?

While consumer receptiveness to new products is somewhat consistent across the world, significant country-by-country variability in acceptance drivers exists, depending on cultural dimensions such as uncertainty avoidance and individualism. Marketers should take these factors into consideration when crafting advertising and promotion campaigns.

By Mark Vroegrijk

A typical global brand is constantly developing new and innovative products to drive continued growth. But the adoption of innovations does not necessarily follow the same path in each country. Differences may exist in how soon sales of new products take off after launch or how many consumers will be converted into buyers. These differences are important for brand managers as they may require new products to be supported with varying degrees of marketing support across countries – such as in the intensity or the amount of time campaigns are run. While some factors influencing this country-to-country variation (such as, how consumers behave towards new products) may be beyond the control of managers (like differences in economic wealth and access to information; Tellis et al., 2003; van den Bulte and Stremersch, 2004), there is more room to influence another underlying source – how consumers in different countries perceive and respond to new products.

For this article, our focus is therefore on gaining more insight into how innovations come to be accepted across different countries and whether any differences can be attributed to variations in consumer culture. We hope to shed more light on how marketers can best account for differences when launching a new product and increase their chances of success in as many markets as possible.

A country-focused model of new product acceptance

We wanted to find out how countries differ in their perception and response to product innovations and whether these differences can be linked to the countries' cultural profiles. We analyzed a data set constructed from our concept test benchmark database. This data set contains a total of 411 product innovations, all tested among a broad consumer audience. These innovations come from multiple categories and countries, as displayed in Table 1.

The first analysis aims to determine whether consumers from different countries differ in their willingness to accept new product ideas, as measured by the accepter score for each innovation in our data set. This metric is based on the Accepter-Rejecter model that is included in each of our concept tests and reflects the degree to which consumers can identify with the new product, see it as a refreshing and worthwhile idea and, ultimately, be interested in buying it.

We are mainly curious about how the level of this accepter score varies across countries. However, not every country in our data set has the same case distribution across product categories, which include both low-risk (FMCG) and high-risk (financial) products. This can also affect the average rate of acceptance observed in each country. Furthermore, consumer judgements of the appeal and quality of the various products in our data set will drive the response to them, which will not necessarily be the same for each country. As a result, we estimate a regression model (sidebar) that accounts for differences across categories and countries and also controls for the evaluation of the innovations (across different dimensions).

Figure 1 displays the base accepter scores for the seven countries (as estimated from the model) and shows the following pattern. When we control for differences in category composition and/or concept quality, product innovations have a ±10 percentage-point higher chance of being accepted in countries such as Germany and the U.K. compared to Denmark. The other four countries then remain in the middle and score around the average of 50%. The differences across countries remain relatively modest but still may explain why an innovation that is tested in multiple countries may show slight differences across nations. That is why identifying potential drivers of this variability remains intriguing.

As a follow-up, we therefore would like to study whether these cross-country differences in the acceptance of product innovations, small as they are, can be traced back to the countries' cultural profiles. We replaced the country-to-country random effect component with the countries' scores on Hofstede's model of national culture. The estimated parameters for each of these six dimensions are shown in Table 2, reflecting their (relative) impact on the likelihood that product innovations will be accepted by consumers.

As can be seen in Table 2, five out of the six cultural dimensions are significantly related to the acceptance of product innovations and will be discussed from most to least important:

TABLE 1

Number of product innovation cases covered by each category and country

CATEGORY	# CASES
Fast-moving consumer goods	82
Finance	26
Home improvement	63
Leisure	10
Meal delivery	230

COUNTRY	# CASES
Australia	46
Belgium	44
Denmark	25
France	42
Germany	67
Netherlands	155
United Kingdom	32
TOTAL	411

FIGURE 1

Base accepter rate per country (inferred from regression model's intercepts)

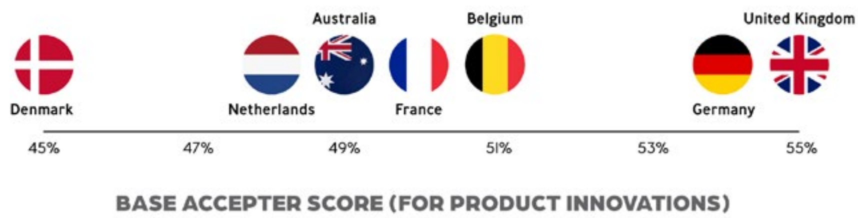


TABLE 2

Standardized regression coefficients for Hofstede cultural dimensions on accepter rates

CULTURAL DIMENSION (HOFSTEDE)	BETA
Power distance	.130
Individualism	.222
Uncertainty avoidance	-.260
Masculinity	.132
Long-term orientation	.211
Indulgence	-.233

.000 Significant (under 90% confidence level) positive relationship between dimension and accepter rates

.000 Significant (under 90% confidence level) negative relationship between dimension and accepter rates

Uncertainty avoidance: Consumers in countries that score higher on this dimension tend to experience more anxiety towards and are less trustful of anything that is unknown to them – which applies at least to a certain extent to new products. As such, the higher a country's uncertainty avoidance, the less consumers will be inclined to accept a product innovation.

Indulgence: At first glance, the negative link between this dimension and the acceptance of new products might not be obvious. However, in less-indulgent societies, the gratification of desires and needs is more controlled and consumers are required to rationalize their purchase decisions more often (Heydari et al. 2021). Since product innovations tend to offer new benefits and improvements that couldn't be obtained before, these might be valid reasons for less-indulgent countries to accept an innovation.

Individualism: In more individualistic countries, consumers make many of their (purchase) decisions purely for themselves instead of for a larger group of people. It follows that this fosters the adoption of new product innovations, as the product then mainly needs to meet the needs of the consumers themselves instead of (also) those of people in their social circle (Ram and Sheth 1989).

Long-term orientation: This is the dimension with the clearest conceptual link to the acceptance of new products. A long-term-focused society sees the world as ever-evolving, making it necessary for consumers to prepare for such changes. By adopting more improved and innovative products, new needs and requirements that arise over time can still be met (Rogers 1976).

Masculinity: A masculine society is more competitive in nature and attaches great importance to material rewards. Possession and/or usage of new products can then provide people with social status (Brown and Venkatesh 2005), leading consumers in such societies to be more receptive to product innovations.

TABLE 3

Relative importance values for concept evaluation dimensions concerning acceptance

COUNTRY	RELEVANCE	CREDIBILITY	DISTINCTIVENESS	WILLINGNESS-TO-SHARE	UNDERSTANDING	BRAND FIT	GOOD PORTFOLIO ADDITION	CLARITY
Power distance	-.050	.751	-.751	-.751	.050	.250	-.050	.350
Individualism	-.238	-.143	.333	.238	.048	-.143	.810	-.143
Masculinity	.098	-.098	.098	.195	-.781	.098	.195	.098
Uncertainty avoidance	.048	.905	-.905	-.619	-.238	.524	-.238	.524
Long-term orientation	-.048	.429	-.429	-.143	-.333	.429	-.524	.238
Indulgence	-.143	-.429	.619	.333	.333	-.238	.714	-.429

.000 Correlation coefficient is positive and significant (under 90% confidence level)

.000 Correlation coefficient is negative and significant (under 90% confidence level)

Identification of key acceptance drivers between countries

Now that the first results indicated that countries differ, albeit modestly, in their intrinsic likelihood of accepting new products, we shift our focus to identifying which innovation attributes are most essential in driving acceptance. And, following the main topic of this meta study, whether these attributes play more or less the same role across different countries or differ in this as well.

We start again with a regression model with each product's accepter rate as the dependent variable and the product's scores on eight evaluation dimensions as predictors. However, we now estimate this model separately for each country in our data set to find the relative importance of the dimensions per country. In each model, we control for category differences by including the values of the category-level intercepts from the first model as an additional predictor variable.

Table 3 displays the relative importance values for the eight evaluation dimensions resulting from each country's regression model. These values represent the degree to which each dimension drives innovation acceptance. When it comes to the role played by these attributes, considerable variability exists across countries. For example, the most important success factor in getting a new product accepted by consumers is that these consumers are actually willing to talk about the product with people around them, as the average importance of willingness to share is 25%. However, the relative weight of this willingness to share differs across nations (Table 4) – 32% in the Netherlands but only 13% in Germany. The second-most important element is relevance, with 16% on average, followed by good addition to current offerings with 13%. Also for these evaluation dimensions, we see substantial differences across countries. The largest variation in importance is actually found for brand fit, where the difference between the country putting the most importance on it (Belgium, 21%) and the country putting the least importance on it (Netherlands, 1%) is 20%.

We can conclude that the key success factors of product innovation vary significantly across countries. To understand why certain attributes are more or less important in some countries than in others, we will again explore the role of national culture as a possible explanation. Therefore, our final analysis aims to link the country-specific relative importance values from Table 3 to the countries' scores on the six Hofstede dimensions by correlating these two types of variables. The correlations (positive and negative) explained how different aspects of a country's culture can affect the importance of certain factors when it comes to accepting new product innovations.

Model estimation details

We estimate a regression model with the accepter score of each innovation as the dependent variable and the following building blocks:

CATEGORY-SPECIFIC INTERCEPT We account for differences in response across categories by including a cross-category random-effect component for the model's intercept. This means the intercept can vary between different categories.

CONCEPT EVALUATION DIMENSIONS We control for differences in appeal and quality across product innovations by including their scores on eight evaluation dimensions as predictors in the regression model (including, for example, credibility, distinctiveness, relevance and understanding). Because the (relative) importance of each of these dimensions varies depending on the product category (for example, credibility may become more important in higher-risk categories), we use the same random-effects approach for the dimensions' model parameters as well, meaning that the parameters are allowed to vary per product category.

TABLE 4

Country-specific percentages for each dimension

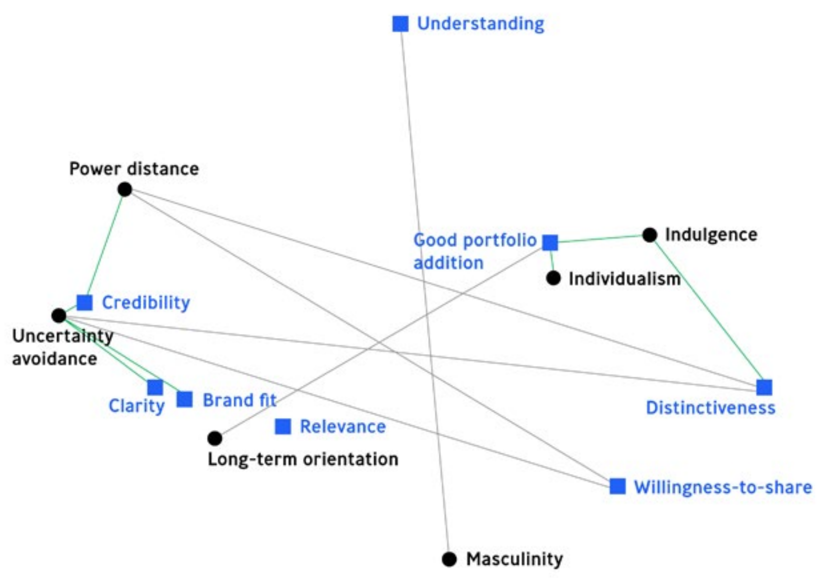
COUNTRY	RELEVANCE	CREDIBILITY	DISTINCTIVENESS	WILLINGNESS-TO-SHARE	UNDERSTANDING	BRAND FIT	GOOD PORTFOLIO ADDITION	CLARITY
Australia	12%	10%	7%	24%	9%	10%	18%	9%
Belgium	13%	16%	6%	17%	7%	21%	14%	5%
Denmark	13%	12%	6%	25%	4%	17%	8%	14%
France	20%	6%	14%	31%	10%	3%	12%	5%
Germany	21%	16%	5%	13%	9%	8%	9%	19%
Netherlands	22%	9%	9%	32%	6%	1%	16%	5%
United Kingdom	12%	13%	6%	31%	9%	8%	11%	10%
AVERAGE	**16%**	**12%**	**8%**	**25%**	**8%**	**10%**	**13%**	**10%**
MINIMUM	12%	6%	5%	13%	4%	1%	8%	5%
MAXIMUM	22%	16%	14%	32%	10%	21%	18%	19%
Δ MAX/MIN	**10%**	**10%**	**9%**	**19%**	**5%**	**20%**	**10%**	**14%**

XX% Country ranks the highest in terms of the relative importance of the corresponding dimension

XX% Country ranks the lowest in terms of the relative importance of the corresponding dimension

FIGURE 2

Correspondence map of correlations between the relative importance of evaluation dimensions and Hofstede cultural dimensions



— Underlying correlation coefficient is positive and significant (under 90% confidence)

— Underlying correlation coefficient is negative and significant (under 90% confidence)

For instance, it was found that in countries with high uncertainty avoidance, credibility becomes a more critical factor. Conversely, in more masculine societies, understanding plays a less significant role.

To better understand these patterns, we've transformed these correlations into measures of association strength. We did this by setting the most negative and most positive correlations to 0 and 100, respectively, and scaling the rest of the correlations accordingly. These measures were then used in a correspondence analysis, resulting in the perceptual map displayed in Figure 2.

Taking a glance at this map, we can immediately identify two clusters that have strong interrelations between the elements. We discovered that in countries with high power distance and uncertainty avoidance, people tend to attach more value to rational aspects of new product ideas. These aspects include how clear and credible the products are and how well they fit with the brand. Consumers in countries with high power distance tend to rely more on authoritative sources in their decision-making, so when an innovation is seen as highly credible, these consumers will be more likely to accept it (De Meulenaer et al. 2017). Consumers in societies with high uncertainty avoidance tend to seek ways to reduce the perceived risks they associate with adopting a new product. An innovation scoring high in clarity is able to communicate its benefits to consumers well – making them better informed on what they will actually be buying (Ulianchenko 2017). When consumers find these benefits of a new product credible, they perceive them as more likely to be achieved when they adopt the product (De Meulenaer et al. 2017). Moreover, if a product innovation fits the brand, this also reduces uncertainty for consumers. They can assume that the qualities they already associate with the existing brand – such as good performance, reliability and/or reputation – will also apply to the new and unknown product innovation (Erdem et al. 2006).

On the other side of the map, we see the second group of elements with strong connections. This group links countries' degrees of individualism and indulgence to the significance of more emotional aspects of product innovations. These emotional aspects include how distinctive the product is and whether it's seen as a valuable addition to the brand's current portfolio. Consumers in more individualistic countries tend to be more appreciative of products that offer something unique compared to existing offerings, as this uniqueness can provide them with a means for self-expression (Eastman et al. 2021). In countries where indulgence is high, and (solely) buying products for one's own joy is widely accepted, there's likely a greater interest in distinctive innovations because they offer something fresh and exciting (Sharma et al., 2010). Furthermore, in these societies where improving one's quality of life is encouraged (Vidas et al., 2021), consumers may be particularly drawn to innovations that clearly enhance the current product lineup, as they fulfil unmet needs and desires.

Nowadays consumers are faced with thousands of new product introductions each year. The outcomes of our analyses provided us with more insight into how consumers from different countries respond to such innovations. Our advice? Innovate globally but communicate locally.

Innovate globally, communicate locally

Nowadays consumers are faced with thousands of new product introductions each year. The outcomes of our analyses provided us with more insight into how consumers from different countries respond to such innovations. Our advice? Innovate globally but communicate locally.

- The countries in our study are not drastically different from each other regarding the likelihood of a new product idea being accepted. While academic studies have shown that new products do not necessarily achieve the same degree of financial success in each country they are introduced in, these differences likely stem more from other factors (such as economic conditions) than dissimilarities in consumer receptiveness to these products.
- Still, we saw some discrepancies between countries, which could be linked to their cultural profiles. If anything, innovations are slightly more likely to be accepted in countries with more individualistic or masculine cultures and that are more oriented towards the long-term.
- When it comes to the key drivers of acceptance, we found more prominent differences. The key attributes for the successful reception of new products may differ by country. In more individualistic and indulgent societies, the unique benefits and improvements offered by a new product should already be sufficient to persuade consumers. This can be put at the forefront of marketing communication as consumers in such countries are primarily seeking products that are distinctive and worthy additions to what is already available on the market. In countries where power distance and uncertainty avoidance are high, consumers may first need to be convinced of the trustworthiness of the product itself or the brand behind it, before any believable claims on the advantages that the new product offers can be made.

Our findings demonstrate the benefits of highlighting different aspects across different countries in marketing campaigns aimed to support innovation, to maximize the chances of the new product becoming a truly international success.

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••• b2b research

Decoding the hidden whys

How to use laddering to uncover the emotions surrounding B2B jobs to be done

| By Tracy Tuten

abstract

While jobs to be done is an effective way to mine a B2B buyer's state of mind, little has been published on how to structure discussion guides to capture buyer emotions. Here, laddering is shown to be a useful tool to identify insights for a leading technology brand's global ad campaign.

A 2022 study of business leaders in the U.K., profiled in the alan. report The Power of Provocation, found that a whopping 98% believe B2B brands fail to connect with buyers on an emotional level and 74% wish brands would connect with them in more meaningful ways.

What's more, behavioral economics points to the value of considering how emotions affect rational decision-making. Richard Thaler's seminal work on behavioral economics demonstrates that emotions, biases and heuristics play a role in decision-making. Daniel Kahneman, author of "Thinking, Fast and Slow," expands on this principle, revealing that thinking can be thought of as System 1 and System 2. System 2 is rational, logical and cognitive – what marketers and market researchers generally assume about buyers and their purchase decision-making process, particularly in the B2B space. The problem? Kahneman says that System 2 is often a "slave" to System 1 – System 1 being the mode that uses fast, intuitive decision-making driven by emotions, gut instinct, heuristics or rules of thumb.

This represents a challenge to both marketers and market researchers. As Bayzle and Murray point out in their March 2023 Quirk's article ("Linking the heart and the mind: How latent emotions drive decision-making"), people may not be consciously aware of their emotions, which limits their ability to articulate them; consequently, market researchers may miss part of the picture. And, in fact, we see this in our own research; it is typically a challenge to get businesspeople to articulate their emotions.

In addition, B2B buyers are different than consumers. Functional needs are paramount. Chuck Bean makes this point in his July 2023 Quirk's article ("Art and science: Injecting emotion into business-to-business marketing"), warning market researchers to tie emotions to functionality when studying B2B buyers. B2C decisions may be entirely driven by emo-

tion but for business buyers, the core functional requirements serve as a trigger to emotional responses.

JOBS TO BE DONE AS QUALITATIVE METHOD

With these points in mind, we chose to follow a modified jobs to be done (JTBD) method for a qualitative study designed to discover the emotions and motives of B2B buyers with the objective of informing the global ad campaign strategy for a leading technology brand.

Specifically, the study sought to 1) map jobs to be done to broadly understand what technology buyers are trying to accomplish, how they get there and their emotional experiences along the way; 2) understand the role of System 1 and System 2 thinking in technology purchases; 3) understand the role of emotion in purchase decisions; and 4) depict the emotional pathways reflecting the buyer experience – both related to the product and the decision process.

Picture this: Every time a customer – whether it's an individual consumer or a business – reaches for their wallet, they're not just buying a product, they're hiring it to do a specific job – the product is just a means to an end. It helps the buyer get what they really want. That's the basic premise of jobs to be done, which acknowledges that buyers have core functional jobs but also emotional and social jobs in mind for the products and services they are purchasing.

- The core job is the underlying process or objective that a customer wants to accomplish in a specific situation or circumstance.
- Functional jobs are the practical and objective outcomes that customers want to achieve. For example, a customer who buys a laptop wants to perform tasks such as browsing the web, writing documents or attending virtual meetings.
- Emotional jobs are the personal and subjective feelings that customers want to experience or avoid. For example, a customer who buys a laptop wants to feel productive, creative or prepared and they want to avoid fears about security.
- Social jobs are the external and interpersonal impressions that customers want to make or avoid. For example, a business buyer may want others to see him as a strategic leader or a consumer may want to be seen as fashionable.

JTBD has been the focus of many articles and books describing the theory (see, for instance, Christensen et al.) and a corresponding research methodology. However, the literature emphasizes the discovery of functional jobs and desired outcome statements through qualitative and quantitative research. Little guidance is provided for researchers seeking to reveal emotional and social jobs and their related desired outcomes.

To fill this gap, we modified the JTBD method to incorporate laddering – also known as means-end chaining (Gutman, 1982). Laddering is a technique used in IDIs to determine linkages between the product attributes people care about and the related latent emotions, perceived consequences and higher-order values. JTBD aligns well with laddering in that attributes relate to functional jobs, desired consequences relate to desired outcome statements and emotions and values relate to emotional and social jobs. Laddering is accomplished through the use of probes during in-depth interviews, most commonly "Why is that important to you?"

INCORPORATING LADDERING IN JTBD IDIS

Integrating means-end laddering is a powerful approach to effectively elicit emotional jobs in a JTBD qualitative study. Laddering helps uncover the deeper emotional and social drivers behind functional jobs by probing the underlying reasons for the importance of specific attributes or outcomes.

Steps to incorporate laddering

1. Start with functional jobs: Begin by identifying the functional jobs that the product or service helps the buyer accomplish. Ask questions that explore the practical and objective outcomes the customer seeks.

Example question: "What tasks do you use this technology hardware to accomplish in your daily work?"

Follow-up probes: "Can you walk me through a typical day using this hardware?" "What specific features of this hardware are most important for these tasks?"

2. Introduce emotional probes: Once functional jobs are identified, introduce laddering to explore the emotional and social dimensions. Use open-ended probes to dig deeper into the reasons behind the functional needs.

Example probes: "Why is that feature important to you?" "How does using this hardware make you feel?" "What worries or concerns do you have when using this technology?"

3. Uncover emotional and social jobs: As respondents answer the probes, listen for mentions of emotions and social perceptions. These responses will reveal the emotional and social jobs that accompany the functional jobs.

Example dialogue:

Interviewer: "You mentioned that the security features are crucial. Why is that important to you?"

Respondent: "It ensures our company's data is safe, which gives me peace of mind."

Interviewer: "Why is peace of mind important in your role?"

Respondent: "Because it helps me focus on strategic tasks without worrying about potential breaches."

Interviewer: "You mentioned that focusing on strategic tasks is important. Why does that matter to you?"

Respondent: "It allows me to contribute more effectively to the company's growth, which aligns with my career goals of becoming a senior leader."

ANALYSIS TECHNIQUES

The conversations were analyzed using thematic content analysis, the jobs to be done framework and linguistic analytical software tools (specifically, LIWC). As a result, we were able to map the participants' jobs to be done to broadly understand what technology buyers are trying to accomplish, how they get there and their emotional experiences along the way. The results produced job statements that reflect the participants' functional, emotional and social jobs as they consider technology purchases, like the two examples below:

Job statement: I want to align performance specifications in PCs so that I can enhance employee productivity, minimize employee complaints and maximize employee satisfaction. (functional job)

Job statement: I want to choose PCs to demonstrate empathy for employees, reflecting care and concern for their work and user experience. (emotional/social job)

The LIWC software was useful for measuring the prevalence of rational, cognitive thought reflected in language versus that of more emotional drivers, providing insight into the respective roles of System 1 and System 2 thinking in technology purchases.

We visually depicted the emotional pathways identified, illustrating interrelated elements such as: stressors that can prevent decision makers from achieving their desired outcomes; the moderating factors that can impact the perceived risk; and the desired feelings that decision makers are seeking as their ultimate outcomes.

Emotions can be activated

While B2B buyers follow a decision-making pattern that is largely rational, with an emphasis on functional jobs, emotions do play a role to varying degrees and can be activated through marketing techniques.

High-involvement, complex technology purchases aren't entirely rational – emotions and mental shortcuts (heuristics) play a role (System 1 thinking). When marketers fail to recognize the emotions buyers feel and desire to feel, they miss an opportunity to move the brand beyond commodity-status to a more compelling position in the market.

By incorporating means-end laddering into JTBD qualitative studies, researchers can unlock the hidden emotional and social jobs that influence B2B technology buyers. This approach not only provides a more comprehensive understanding of buyer motivations but also equips marketers with insights to create emotionally resonant campaigns. Understanding that B2B buyers are not solely rational decision makers but are also influenced by emotions and social perceptions can transform the way technology brands connect with their audience.

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••• online qualitative

From isolation to interaction

Enhancing the virtual backroom experience

| By Sofia del Busto

abstract

Maintaining focus during virtual qualitative research can be challenging due to various distractions but the SPARC approach is designed to keep research teams and clients connected and inspired by creating an engaging, collaborative environment.

Listening to virtual qual can be … a challenge. It's a familiar story: The session starts. You are in your home office, in your casual attire, a fresh cup of coffee in hand. The ping of an e-mail notification suddenly forces the respondent's voice to the background. Another e-mail comes through – you check it out. Interesting. Oh, there's another one. Less interesting. Facebook sends a notification. You can't resist, so you look. You notice a LinkedIn alert. The article is only a three-minute read; it won't take too long. Click. Your Ring doorbell picks up a UPS truck delivering a package. I wonder what that could be?

It's no secret - it can be hard to stay focused on virtual qual for the full 60-90 minutes!

People talk about how in-person qual used to be so much better. It was easier to stay focused in a research facility built specifically for the purpose of viewing research. But was it really?

You remember the feeling – sitting in a dark, too-hot or too-cold room, not knowing the time of day, eyeballing the bag of M&Ms you would inevitably reach for, listening to colleagues and clients laugh about a shocking comment on the other side of the glass, hoping that the respondents wouldn't overhear. Despite being together, the crowded in-person back rooms could be lonely places where the sound of tapping keyboards filled the void between interviews instead of constructive dialogue.

The truth is there are and always were issues with qual back rooms, virtual or at a facility, pre- or post-pandemic. They can be lifeless places that, if not managed, do not nurture the collaboration required for outstanding research to flourish. Sometimes there's no energy, no magic.

Conversely, purposely creating an engaging and inclusive research environment can fuel collaboration. It can build synergy so all parties feel involved in the research process and its success. An engaged back room cre-

ates value and ensures that the client's needs and objectives are realized and then some.

At our firm, keeping the magic alive in the back room has always been important to us. We have long believed that what goes on behind the glass is just as important as the interview itself. Our in-person back rooms are known for being lively both during and after sessions. We pride ourselves on using structured techniques to engage our client teams to ensure everyone feels connected.

Even before the pandemic, we worked on replicating our in-person backroom approach to a virtual setting. It was crucial for us to find a suitable solution that emulated the in-person magic for our virtual interviews to maximize the client experience and expand opportunities to engage a wider range of stakeholders. While we were close to losing the physical presence of a back room when the pandemic hit, we used techniques to re-create the experience of our structured collaborative format virtually and gained a wider client reach as a result. We strongly feel it is our duty to bring our clients closer to the research and to their customers. That is the motivation behind our backroom approach: structured participation and research collaboration (SPARC).

A process for collaboration

SPARC is a process for collaboration and anyone can do it. So how does it work? Throughout fieldwork, before, during and after the interviews, we engineer client interactions into the process to keep things alive. Before the research begins, we connect with the team to hear hypotheses, develop concepts to test and ultimately stress-test the line of questioning together. During and after interviews, we moderate discussions with our clients and their stakeholders to collectively discuss what we heard in an interview. Our team catalogues key thoughts throughout the research process to ensure we capture the evolution of themes that emerge. After interviews, we collaborate with the team to iterate the research and gain deeper insight. Our approach in-person has always been coaching clients on how to breathe life into these small moments. SPARC began as an in-person approach but has evolved beyond that. Our virtual iteration of SPARC is similar.

Picture this:

You're sitting at your home office desk, enjoying a nice cup of coffee in your casual attire, excited as you click into the virtual interview. Immediately, you see the research team and your colleagues chatting in the secret space about the respondent's profile. The interview begins and you feel the energy and enthusiasm from the research team as they share recurring themes, make connections to past work done with you and call out strategic opportunities throughout the interview. You feel inspired to tag quotes, share your perspective on connections to current strategic initiatives and react with emojis to shocking commentary from respondents. Suddenly, an hour has gone by, the interview is over and the moderator comes on the line. You collectively discuss how best to adjust the line of questioning to dig deeper into areas of interest that have emerged as the interviews have gone on. The meeting ends and you get up to refill your coffee, eager for the next interview to begin.

That is the goal of the SPARC experience.

We use videoconference technology to create virtual environments with research-viewing capabilities and a private chat to mimic the physical backroom experience for clients. The SPARC approach can be used to: discuss fieldwork findings in real time; post interesting quotes, comments and any surprises in the moment; allow clients to keep in contact with the research team and their internal stakeholders throughout each session; request questions for the moderator to ask; note themes and trends as they appear; react to responses to encourage continued conversation; review the catalogue of insights to compare/contrast interviews or review a missed session; and serve as a space to hold a post-interview debrief without having to exit the meeting.

The power of SPARC is that it is methodology agnostic. The same principles apply whether you are in-person or virtual. The tools we use stream in-person interviews to clients who may not be able to travel, allowing them to participate in the backroom discussion with in-person clients as if they were physically present. We catalogue moderated discussions with the team in a structured online database that clients can access throughout the research to catch up on an interview or to compare what they heard from earlier sessions. This enables client engagement and connection to the research journey from wherever they are.

The integration of technology into this approach has expanded our ability to collaborate. The virtual back room not only saves the conversations for posterity but allows viewers to post during and after interviews, in-person or virtual. The backroom chat remains open 24/7 between interviews, allowing people to post comments and insights as they begin to digest the interviews. For client-side insight teams, those capabilities are critical. The back room is a crucial place to engage stakeholders. Our clients leverage this to get stakeholder buy-in, showcase a new side of the business and ultimately increase research visibility. We create opportunities for structured collaboration to ensure this happens so they feel invested in the research success.

Client feedback for SPARC has been positive, with many remarking on the impact the collaborative research experience has had at their businesses. Now that SPARC has a wider reach among client teams, stakeholders beyond the research team quote respondents from interviews, insights from debrief calls and action items discussed in moderated sessions between interviews. This approach to the backroom experience is not only approachable, it's impactful and empowers our clients and their stakeholders to act.

Extract more value

The growth of virtual qualitative has changed the way we conduct and engage with research but there's an opportunity to extract even more value from these moments. The magic of the back room is not lost, it simply requires reactivation, using approaches like SPARC, to keep researchers agile, relevant and future-focused. We have a responsibility to connect our clients (and their stakeholders) to the research we conduct. When we bring insights to life in this way and make them loud – shine a light on them, talk about them, socialize them – they reverberate across a business. Loud insights inspire stakeholders to act, to innovate, to change. At the end of the day that's why we do what we do as researchers, right? To make a difference and bring businesses closer to the needs of real people. Backroom magic results in loud insights. Loud insights make a difference – they inspire change and take businesses to the next level.

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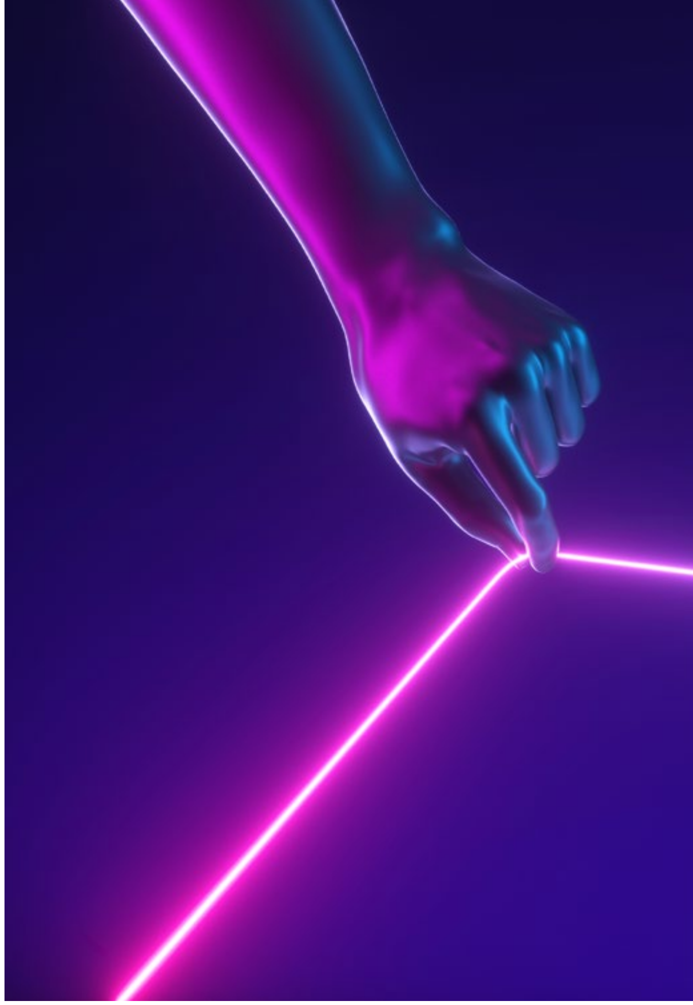
●●● ai and marketing research

Capturing the human element in an artificial world



How AI can actually make research more people-centric

| By Eric Tayce

abstract

The integration of AI into marketing research introduces a paradox: While AI offers unparalleled efficiency and data processing capabilities, it challenges the industry's push for human-centric insights. But by leveraging AI to complement human intelligence, researchers can achieve more nuanced understandings of consumer behaviors, enriching the value delivered to clients.

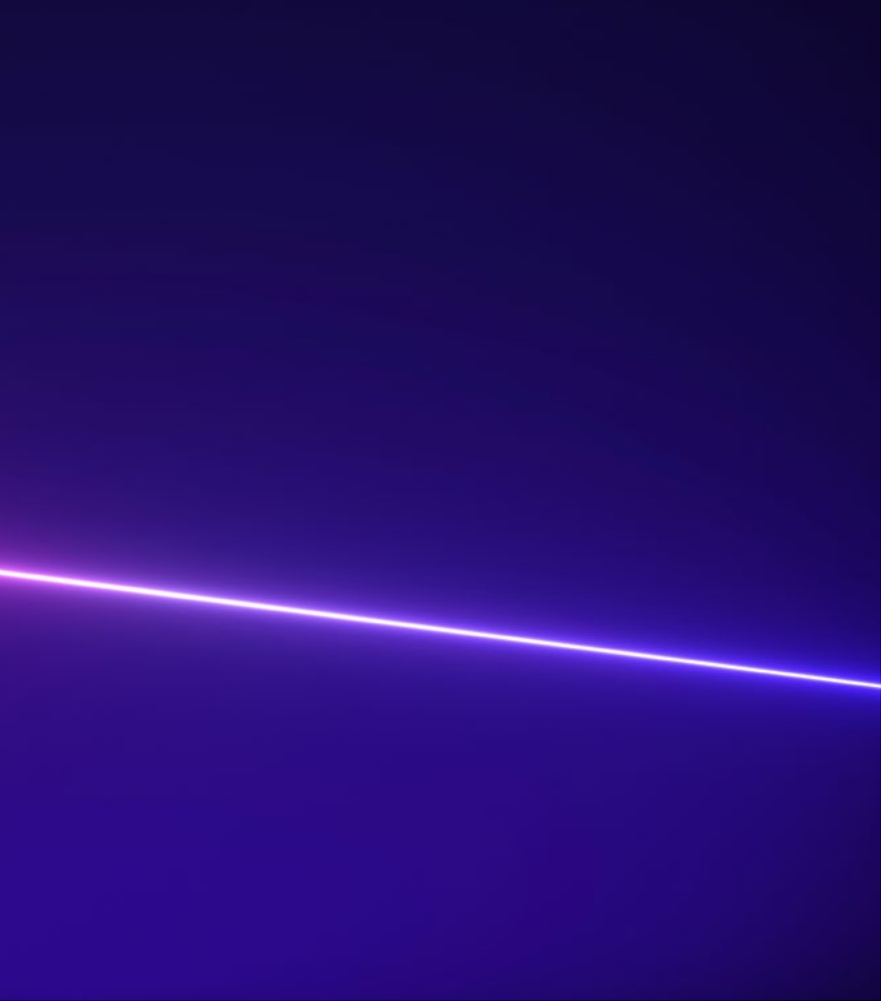
"I was shooting bricks all night" is the kind of comment most people can understand coming from a professional basketball player after a losing game. It's also the kind of comment that led artificial intelligence to claim Golden State Warriors shooting guard Klay Thompson had been on a window-breaking vandalism spree in the San Francisco area earlier this year (he had, in fact, not thrown any real bricks at all). This is an extreme instance, of course, but it's a good reminder that humans are still a necessary ingredient for conducting insightful research and data analysis about…humans. Even before the recent explosion of generative AI, we saw a concerted effort to inject more humanity into research processes and deliverables. But the promise of flexibility and efficiency through AI is too impossible for our industry to ignore.

Initially, this seems to present a paradox: our desire for humanized insights contradicts our inevitable shift toward generative processes. However, looking deeper, we see potential for AI and HI (human intelligence) to not only coexist but to complement one another. As such, we believe AI can help researchers comprehensively elevate value for clients, while expanding our capacity for human understanding like never before.

But before we look at how – and why – we believe that's possible, let's further explore the unique challenge of deploying AI in an industry that's already sensitive about overreliance on technology.

Lived experiences

The industry's push to humanize research data manifests in the language we often use. Phrases like "human element" and "people-centric" speak to insights that reflect real-life perspectives and lived experiences. This human focus also manifests in the proliferation of streamlined, narrative-style reporting that has replaced data-intense tomes and clinical-sounding slide titles.



Through storytelling, we tackle the dual objectives of informing business strategy while also communicating with organizational stakeholders on an emotionally engaging level. The payoff, we believe, lies in a deeper understanding of the unique motivations and experiences that drive customer behaviors. Finding the "human" in the data is, metaphorically speaking, the Holy Grail in research. Humans are – after all – the subject of everything we study.

Yet, since the introduction of generative large language models (LLMs), the Holy Grail seems to have shifted. As new AI capabilities become available, we move a few steps closer to removing the "human" that we tried so hard to prioritize. Where once we yearned for deeper human understanding, we now find ourselves evaluating the trade-offs made for synthetic data sets and self-optimizing algorithms.

The best of both worlds

But the benefits of "humanizing" research and the benefits of embracing AI don't have to be mutually exclusive. While it may seem counterintuitive, we've found that AI can actually make research more human. Based on our experience, here are a few key examples.

HUMANIZING SURVEYS

Researchers have long acknowledged the limitations of survey research and its inability to re-create the experience of making real-world decisions. This is an area where artificial intelligence can help. For starters, AI allows us to minimize the unnatural artifice of survey research through conversational experiences via chatbots, even if just for small portions of the survey. For instance, our own experimentation shows that following open-end responses with conversational AI-powered probing leads to an average of 270% more unstructured data being collected from respondents.

Organizations can also use generative LLMs to mimic natural conversation through iterative questioning techniques that can capture a much wider range of consumer perceptions and opinions than traditional approaches. In fact, we've found that properly trained chatbots with well-defined guardrails can reliably identify optimal price levels, investigate decision drivers and generally deliver a richer experience for the respondent. The humanizing trend sets the tension and artificial intelligence solves for it.

ASSESSING UNSTRUCTURED DATA

In addition, AI tools can more effectively analyze unstructured data versus traditional methods, parsing out more organic, more human insights. Unstructured data has traditionally held limited business value for organizations, simply because the methods for analyzing it are either computationally too complex or logistically too time-consuming. However, AI's massive computing power has removed this barrier. Researchers are unlocking new value by using AI-powered algorithms to execute techniques like sentiment analysis and theme detection on unstructured data. These deliver respondent-level indicators that can be used to predict behaviors or to develop targeting strategies.

CREATING DATA COHESION

Estimates vary, but most experts agree that between 80% and 90% of all enterprise data is unstructured, making AI's inherent flexibility a tremendous strength by broadening the range of data sources that can be linked with survey records. Social media posts, customer service chat logs, survey research and call transcriptions are all candidates for deepening our understanding of consumer behaviors. Each data point humanizes the insights by building context. Intelligently integrating these sources enriches the depth and texture of insights by building truly multifaceted perspectives. Ultimately, this helps support strategies that align with the authentic sentiments and preferences of a target audience.

MASTERING REPORTS

The humanizing impact of AI also extends into the domain of reporting, where it's reshaping the way insights are communicated and understood. Fine-tuned GPTs (generative pre-trained transformers) are infinitely moldable, able to ingest data and adopt engaging personas that mimic real consumers down to the smallest details.

When informed with data from a market segmentation, for example, AI-powered personas have the potential to provide insightful opinions, reference detailed statistics, discuss motivations behind behaviors and even engage in simulated conversations that illuminate varied perspectives and insights rooted in facts. Thus, AI helps transform traditional static deliverables into vibrant, interactive narratives that foster a deeper, self-led understanding of research outcomes.

Ethical and operational challenges

While the integration of AI into marketing research unlocks a host of new opportunities, it also presents significant ethical and operational challenges. First, security and privacy concerns are paramount – LLM-based AI systems typically employ APIs to facilitate communication between remote servers and users, which means sensitive data travels outside company firewalls. And while small language models can be used on local devices, they currently lack the computational power needed to execute the kind of AI-powered work described earlier.

Furthermore, today's leading AI language models are trained to provide friendly assistance to the user – even casual users notice a helpful, upbeat tone in their interactions with GPTs. Without the right constraints in place, chatbots will reward positive survey responses with affirming interjections like "that's great" and "I'm glad you think so," potentially prodding a respondent toward a conclusion they may not have otherwise reached.

It's also important to remember that AI mistakes and hallucinations are fairly common – but they're not completely understood (even by LLM builders themselves). This researcher has reviewed survey chat logs in which a chatbot reached an optimal price for a product and then informed the respondent that "a draft contract is in the works!" AI/LLM models are essentially a black box; researchers are wise to maintain close oversight and to provide copious direction for how they execute prompts.

But LLM models become less of a black box when you train them on proprietary data and use carefully engineered prompts designed around specific research needs. An off-the-shelf LLM creates output that reflects the entirety of the data on which it was trained, complete with any errors and biases that may be present. Thus, it's absolutely essential to train and fine-tune models so they stay grounded in relevant facts while remaining flexible enough to reliably navigate open-ended interactions. To this end, special attention needs to be given to dataset quality; only real human inputs will provide models with the ability to mimic the opinions and behaviors of real humans. As with any programmable system, the outputs from AI are only as good as the inputs.

Monumental change

The future trajectory of AI in research promises monumental change. As AI technologies advance, we anticipate the development of intuitive systems capable of conducting in-depth, conversational surveys. These systems will adapt in real time to the flow of dialogue, much like a human interviewer. Voice capabilities will mimic real interviewers, with the added benefits of perfect diction, an encyclopedic knowledge of the topic and an ability to leap across devices (watch, phone, tablet) to better accommodate respondents' schedules.

Another exciting possibility lies in AI's potential to create fully personalized survey experiences. AI will tailor surveys based on a respondent's personal profile, known behaviors, social network and even the emotional cues picked up throughout the interview. With all the right context in place, an AI model will have complete freedom to accomplish a set of research objectives using any path it chooses, dramatically increasing respondent engagement as well as the richness of data captured.

Further, integrating AI with existing technologies will lead to continuously learning systems. These systems work off "North Star" directives that establish ground rules for how algorithms are refined as new data comes online, allowing them to improve their questions and interactions over time without human intervention. Models with highly specialized profiles will evolve and new data silos will be a source of competitive advantage in the marketplace.

Deepen our understanding

The integration of artificial intelligence into traditional marketing research represents an opportunity to unlock fresh, dynamic perspectives on the human experience and to fuel actionable insights. By enhancing data collection, analysis and reporting, AI offers a pathway to deepen our understanding of consumer behaviors, motivations and preferences.

However, we can only realize this potential through thoughtful implementation that addresses ethical and operational issues. Moreover, we must continue to prioritize high-quality human input as we expand our usage of AI. After all, humans are the subject of our study.

As AI evolves, its role in creating more empathetic, nuanced and dynamic insights will become increasingly important for driving innovation and connecting more deeply with consumers. The journey of integrating AI into marketing research is just beginning and its transformative impact will undoubtedly reshape the industry in exciting, and likely very unexpected, ways.

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THE Q REPORT

CORPORATE **RESEARCHER** REPORT 2024

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

QUIRK'S MEDIA

WELCOME TO THE 11TH ANNUAL Q REPORT!

Again this year we will be spreading our Q Report coverage across our print and digital outlets to give us more space to work with and also expand the potential audience for findings from the annual survey.

This issue features my overview article exploring thoughts on AI, pain points and changes planned for the upcoming year along with a topline view from Marlen Ramirez of topics like job satisfaction and hiring plans.

In the coming issues we will draw from Q Report survey findings to look at key metrics against which insights functions can be judged and internal and external perceptions of the value of marketing research.

The survey was fielded from June 17 to July 23. In total we received 1,504 usable qualified responses, of which 502 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.49 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

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

We hope you find this report useful. Please let us know how we can make future editions more informative and valuable to you.

Joseph Rydholm
Editor
joe@quirks.com

THANKS TO OUR CONTENT PARTNERS FOR SHARING THEIR INDUSTRY INSIGHTS:

InsightFarm offers tips on writing effective AI prompts.

Suzy looks at trackers and how to maximize their value and impact.

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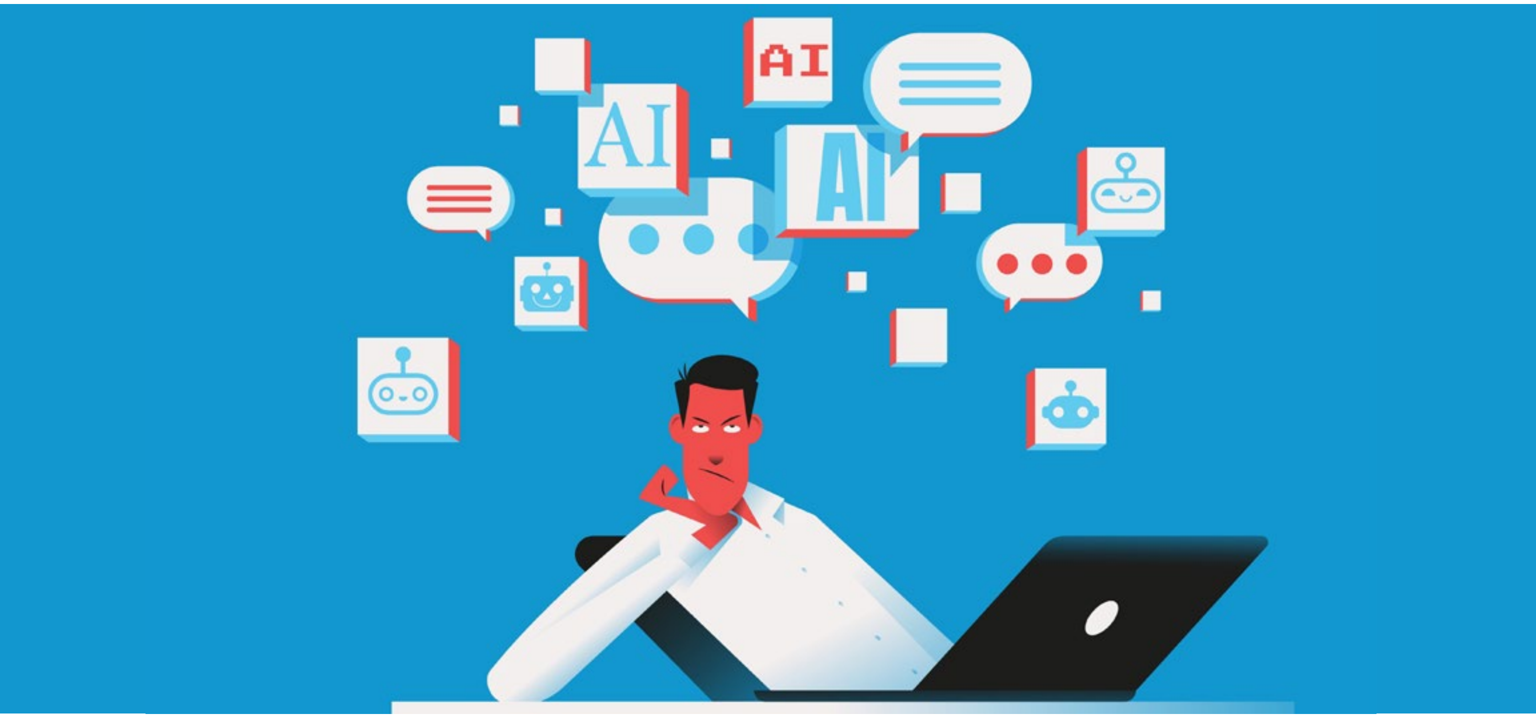


'AWARE OF EVERYTHING, EVERYWHERE, ALL AT ONCE'

Q Report respondents opine on AI, pain points and future plans

By Joseph Rydholm >> Quirk's Media

If there's one thing researchers are sick of, it's hearing about AI. At least that was the constant refrain from speakers, audiences and exhibitors across our four Quirk's Events this year. Funny thing is, for as much as they are tired of it, they sure seem to be curious about it, based on some of the findings from our 2024 Q Report.

As part of our annual survey of Quirk's readers – the findings from which we will report on in this issue and in more depth through regular features in each successive issue – in addition to their thoughts on the impacts of AI, for this iteration we also asked about pain points in being a researcher and conducting research, the biggest research-related changes they foresee for their organizations in the coming year and their general thoughts on the use of emerging tools.

The survey was fielded from June 17 to July 23. In total we received 1,504 usable qualified responses, of which 502 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.49 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

When it comes to AI (or "bloody AI" as one presumably U.K.-based respondent called it!) 44% said they have already integrated it into their research, with 16% planning to in the next year and 31% in the "still reviewing" stage.

Related to that, when asked which emerging tools from a supplied list they planned to integrate in the next two years, 80% selected AI and machine learning, 48% cited real-time data analytics, 44% indicated integration of behavioral data and 20% synthetic data.

To get a sense of the level of dread (or lack thereof) toward AI, we asked for their takes on its potential impact on marketing research. Two-thirds said it would probably or definitely elevate the role of MR (49% probably, 17% definitely); 22% picked "probably puts the role of marketing research at risk;" and 10% said it won't have much of an impact.

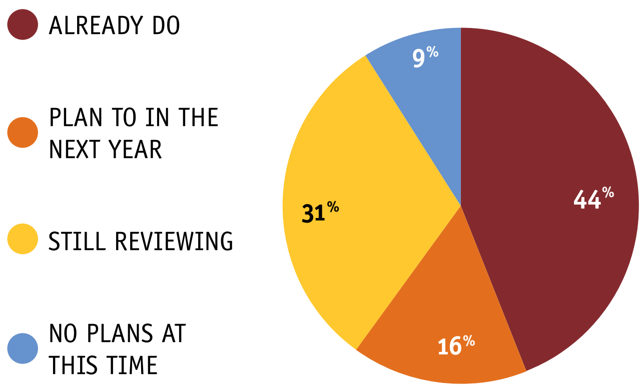
Somewhat in contrast to that fairly sunny outlook on AI, comments to a related open-end were gloomier, ranging from the fatalistic…

I don't think that AI (which is just a marketing term) can ever replace what we as analysts actually do (or are capable of doing if given the opportunity). But the hype, hope and push towards the cheapest, lowest common denominator may do real harm to the industry. The biggest benefit of [marketing research] is the custom aspect, getting insights specific to the business issue at hand and addressing the decision point directly. All this push toward commoditization just leads toward crappy outcomes for everyone (fewer MR jobs, poorer data and less informed decision-making). But the tech guys will pocket a bunch of cash before it comes crashing down.

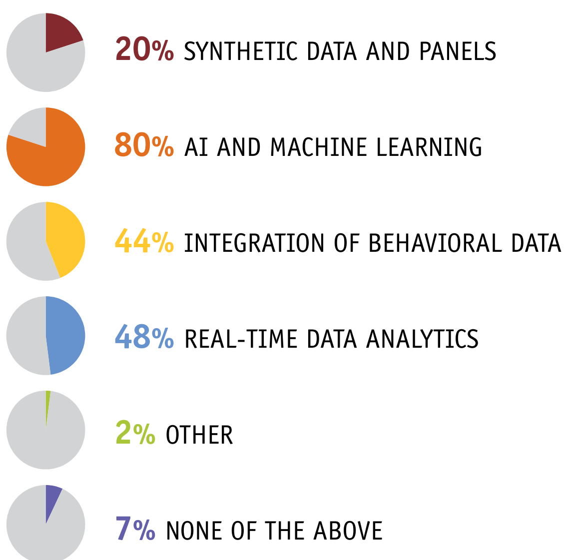
I see significant risks to traditional MR when it comes to AI. I am hearing more and more of "Actually, Chat GPT drafted a great survey," or "That AI xyz had a great answer for creating good-enough personas, segments, etc.," or "I can just paste this to Copilot and analyze the data – why do we even need so much time for analysis?" Synthetic respondents are generating quite the curiosity. Meanwhile, panel and data quality is continuously deteriorating and it's becoming increasingly hard to distinguish between real people and AI bots. Not to be all doom and gloom but MR must reinvent itself as an industry (like many others) to survive.

I'd say it puts the role at risk in the short-term because I'm pessimistic that the focus won't just be on automation and simplifying processes. I hear more about replacement through AI than I do elevation of processes. I generally think, based on what I've been exposed to, the direction of AI tool development does a lot to undercut the professionals who have dedicated their careers to enhancing consumer understanding. Clearly, this is a sore spot for me at the moment.

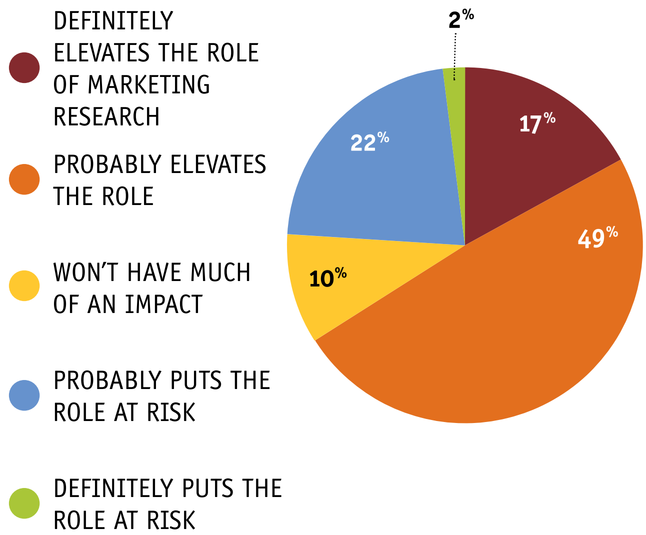
Do you have plans to integrate AI into your research in the next year?



Which of the following emerging tools do you think your company will utilize in the next two years?



Do you feel AI will elevate marketing research as a stand-alone function or put it at risk?



…to the optimistic (but clear-eyed):

> *AI (if it can deliver on the promises made) will likely have a big impact on the function. Inside client companies, DIY survey platforms were the first wave that democratized the insights tradecraft. That made the process of conducting quant research doable for the average marketer. They still needed guidance. They needed to understand best practices. They needed to understand the philosophy and underpinnings of good research. AI is the second wave and MAY provide the guidance and thought leadership to execute good research. If true, the average insights person is going to have to redefine the value they are bringing to the table. This disruption may bring good.*
>
> *It depends on what your MR team is doing. If you're spitting out rote tracking reports every quarter/month/etc., then AI absolutely puts your team/role at risk. But if your team is trying to synthesize and elevate a blend of primary, secondary, cultural trends, behavioral data, etc., into actionable insights for specific business needs/decisions, I think AI elevates that type of team/role. Insights and MR roles are likely going to have to evolve, but on balance, I think AI will elevate the industry. None of us got into MR/insights because we loved doing those big tracking reports! I think AI will free up many insights professionals to do more of what many of us love about being in insights – telling deep, human stories with data that will impact our respective businesses.*

And some commenters weren't afraid to get out their crystal balls to envision what an AI-influenced future would look like for researchers:

> *I can imagine a future beyond even synthetic data when multi-modal AI models have evolved to the point where we will engage with them exactly as we would any other intelligent agent – another human, for example. We currently rely on data (the rows and columns kind) to build knowledge and understanding of the world around us. In this future, our AI colleague is able to help us identify product, brand and marketing opportunities and to exploit those opportunities without our kind of data being part of the process. The AI of this future has gained knowledge and understanding from the world (real and digital) directly. In other words, our AI friend is aware of everything, everywhere, all at once.*
>
> *While I don't think anything can replace the human element, companies will look at the money and realize they don't need people to do [research] any longer. It may come full circle; they may eliminate research positions but then when they see AI can't replace them, they will bring them back. But the damage will be done at that point.*

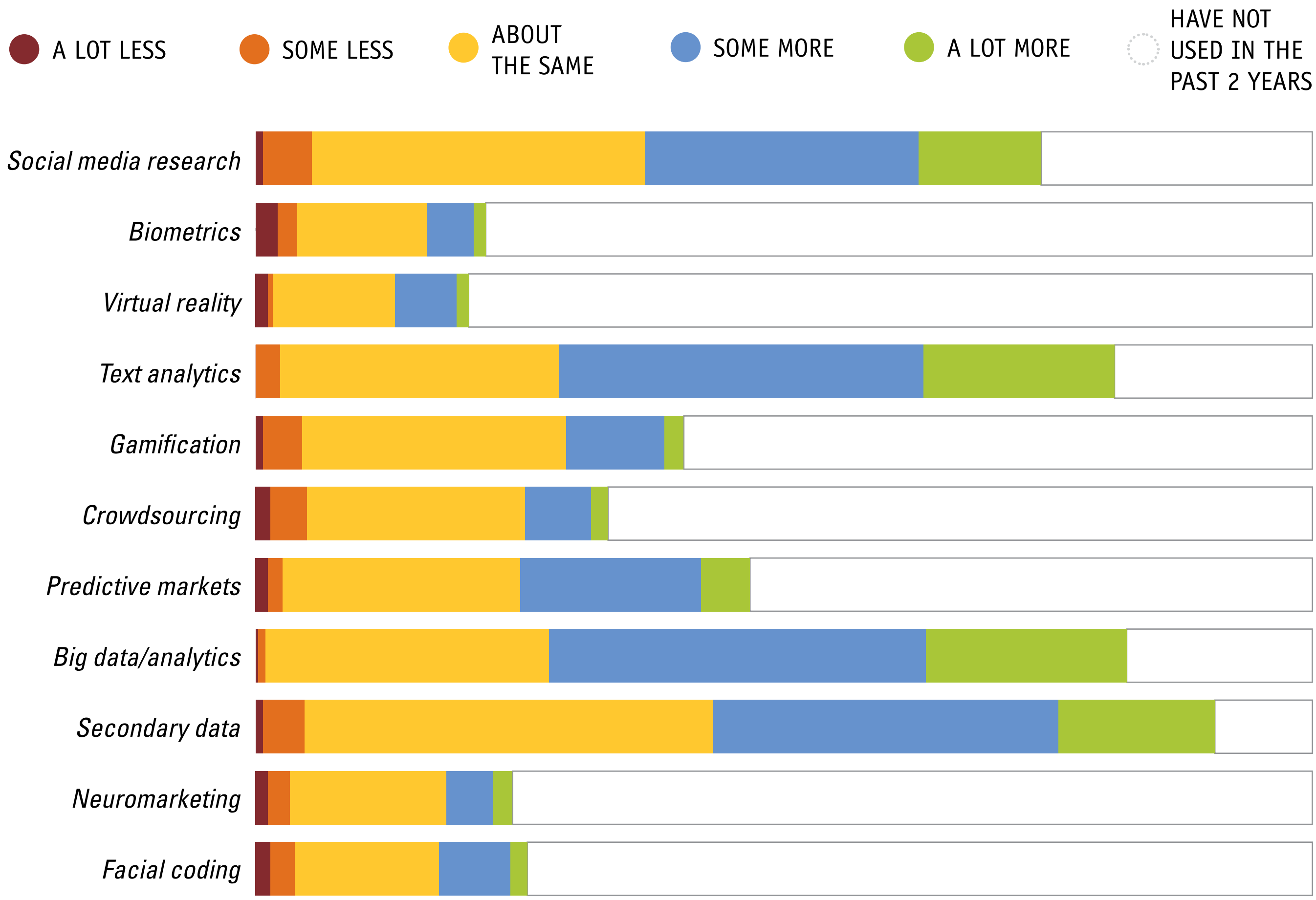
Others reflected on how the capabilities and presence of AI might affect how non-researchers within a company or organization view the insights-gathering function as a whole:

> *Everyone already thinks they can do research. This will just make [that feeling] more universal.*
>
> *Similar to "democratization" of research, [AI] may shift some research responsibilities to non-specialists (potentially at the cost of data quality and methodological rigor).*
>
> *There is a concern that others in the organization may feel they can simply use AI to get a quick-and-dirty answer on something that should have insights providing input and direction.*
>
> *Anything that promises to be quicker and cheaper puts the current tools at risk.*

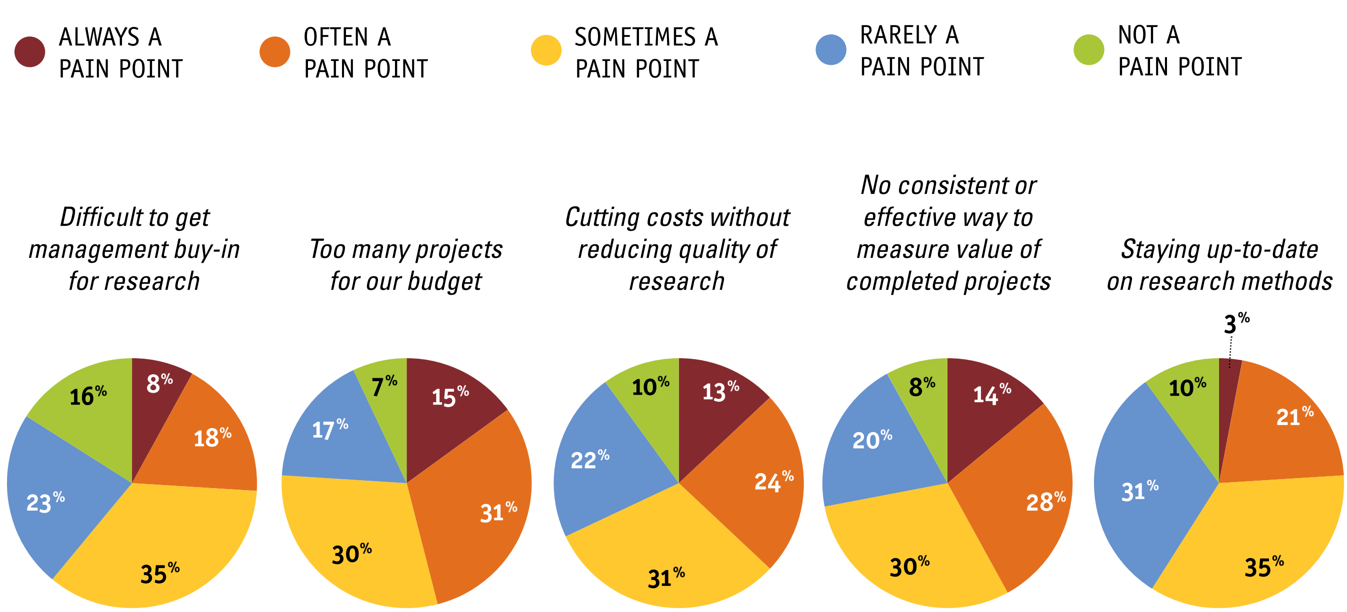
Some view the rise of AI as a response to marketing research's failings or failures (the whole "nature abhors a vacuum" thing).

> *There is an argument to be made that as an industry we have done so poorly with incentivizing and compensating humans to participate that we are forced to turn to AI.*
>
> *Even today, a basic ChatGPT query about specific audience care-abouts, pain points, etc., can often generate information and insights that are not much worse than what comes out of weeks of qual research. To some degree, it has me worried about the quality of the research and insights (black box, AI hallucination) but then again, our panel-based research models are broken also due to fraud and quality issues. I am a lifelong researcher but quite frankly, I look forward to AI providing us with better tools than the traditional research methods that are slow, expensive and fraught with challenges.*

Compared to two years ago is your company doing more or less of the following?



What are your pain points in managing and conducting marketing research at your company?



Broadening out from tools and methods, we also asked respondents an open-end about the biggest research-related changes they foresaw their organizations making in the coming year. Along with several mentions of incorporating AI there were the usual expressions of the need to do more with less, either because of budget cuts or staff reductions, and the attendant determination to make better use of the data they already have.

> *Developing a resource library for stakeholders to access key themes. This is to help share our research with a wider base and to reduce repeat research projects for different parts of the business, when we may already have the answers they need.*
>
> *Some of the traditional MR is getting lots of scrutiny and pressure because what people say they will do is not the same as what they actually will do. So marrying self-reported with marketing analytics and other passive data (like Adobe Analytics) would be an evolution we'd be pursuing more actively.*

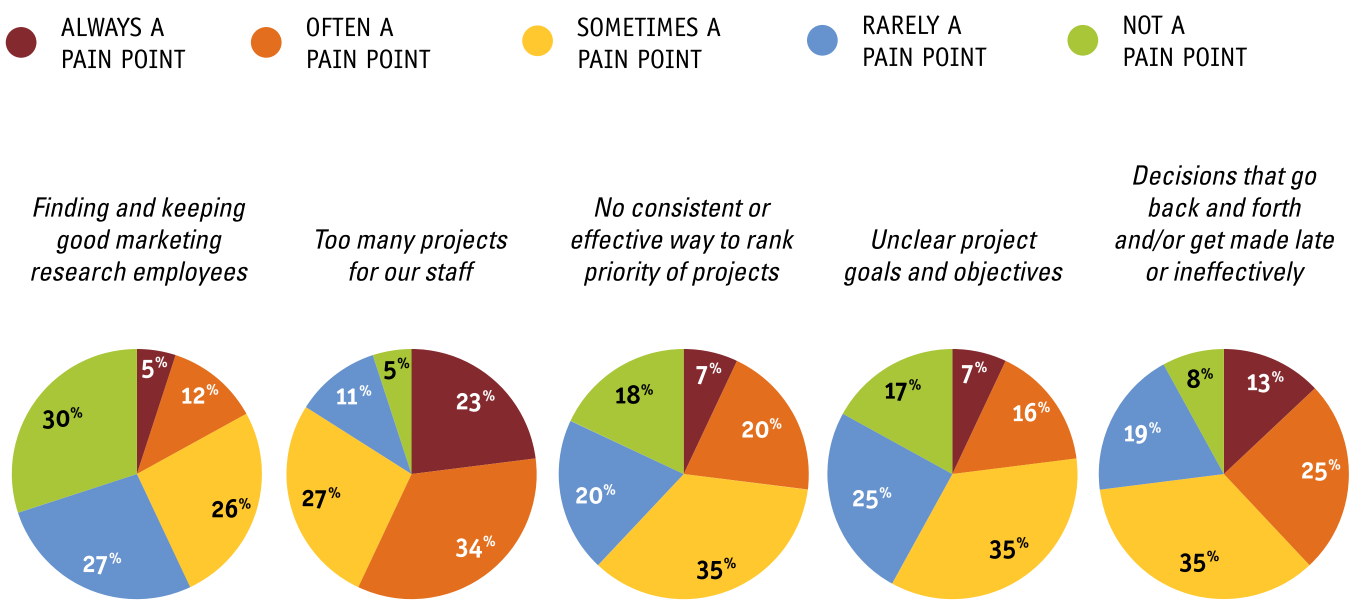
Also there were about the same number of expressions of plans to bring more projects in-house (therefore cutting back on the use of vendors) and expanding the outsourcing of work to research agencies.

> *We are deeply evaluating all of our partners for key research programs (i.e., tracking studies, agile tools, data collection/reporting platforms, etc.) and subscriptions to make sure we're getting the most from our budget and working with partners who can be extensions of our teams.*
>
> *We are moving away from doing the vast majority of work in-house and instead will be continuing to expand the number of projects we farm out to vendors and the number of research vendors we work with.*

Many struck a more hopeful/excited tone when expressing their plans.

> *Expanding our knowledge and insights across the entire organization to have great impact. Implementing a consumer-centric culture and continue to lead our industry in all aspects of growth and brand differentiation.*
>
> *More accessible insights for upper management. Research and insights haven't been engrained in the business historically so we have been working towards standing up foundational studies to have more insights flowing through the business.*
>
> *Use findings more strategically (hopefully), with stakeholders held accountable for acting on findings/recommendations.*
>
> *We have a newer CEO that has been in his role for about a year and a half and there have been a number of restructures that have had impacts across the organization. We have*

What are your pain points in managing and conducting marketing research at your company *(continued)*?



implemented a new strategy process and as a result more research is being conducted and utilized than ever before. I see us having a lot more research requests come from the organization over the next year.

Paired with the forward-looking questions in the survey were some sections designed to get a current read of researchers' situations, this time in the form of pain points they face in doing their day-to-day jobs.

The responses to our list of possible pain points generally follow the age-old researcher lament of having more work than they can handle and lower budgets than they'd like. A combined 46% said "too many projects for our budget" was always or often a pain point. Related, a combined 57% cited "too many projects for our staff" as always or often a pain point. Other top pain points include "no consistent or effective way to measure value of completed projects," "decisions that go back and forth and/or get made late or ineffectively" and the pressure to cut costs without reducing the quality of research.

Happily, finding and keeping good researchers was not a common worry, as a combined 57% said doing so was rarely or not a pain point. Ditto for unclear project goals and objectives (a combined 42% rarely or not) and staying up-to-date on research methods (a combined 41% rarely or not). We asked for elaboration in the open-end and beyond those that added color to the existing answer choices the responses roughly fell into three categories: vendors, internal factors and leadership.

Vendors

Vendor quality has gone down in a major way. My hunch is that vendors are reducing team sizes and stretching teams across more projects and accounts. As a result, my team has to very closely manage vendors who would otherwise field flawed surveys, use too junior of moderators and deliver incomplete or surface-level reporting (which often requires hours of polishing before sharing with leadership).

I'm sick of all the self-service platforms and dashboards and tools. I want quality respondents.

We are a corporate in-house research group that does most of the hands-on research. Hesitate to say DIY because that implies low quality. One key challenge is vendors' dismissal of our abilities to be good researchers or be objective – which really comes across as competitive jealousy. The other is sometimes the difficulty of working with partners for less than full-service services.

Finding vendors that are willing to work with you and listen. So many believe they are the expert in methodology and do not LISTEN to their very experienced CLIENTS. We want proprietary research, not syndicated formulas. Another huge pain point is SAMPLE. Finding and validating qualified, REAL respondents, especially in B2B, is becoming extremely difficult. First lesson I learned when I started my career is that any error within a project can be corrected, EXCEPT BAD SAMPLE. I would like a partner to be a true partner and not caveat everything they say.

The inability to get past traditional methods and advance. It feels like our suppliers are just ready to die with lack of survey response vs. trying to find new ways to collect valuable data. This forces us to look at companies that offer some new untested gizmo but that don't have traditional MR capabilities. Would be great to find a company that did both the tried and true (but dying) aspects of traditional MR while innovating with new capabilities.

I think one of the pain points that I have encountered over the last couple of years is research vendors who are not paying respondent incentives in a timely manner. I see and hear way too many that are taking weeks to get incentives into their research company accounts and then several more weeks to get digital gift cards to the respondents. This is completely unacceptable as a corporate researcher. If digital gift cards are used, they should be able to be sent same-day or at the very latest 1-2 days after the session. If some companies can do it, then the other companies are just holding onto the advance payment of incentives for their own cashflow problems. Ultimately, I believe that this is going to impact the quality and availability of respondents for the entire industry.

Internal factors

One of my biggest pain points is just getting stakeholders in the same room. I have projects that can take 6-7 read-outs and attendance can be an issue. This means not everyone has the information despite facilitating over e-mail. Cross-functional teams not intaking the information together leads to issues in executing actions.

It's never about the research but only about 5% of researchers get that. Until they do, they'll be compartmentalized as a nice-to-have tool instead of a vital business function.

Many tasks are still highly manual and take time away from strategic thinking and drawing conclusions. We should be able to leverage technology more to speed up things like questionnaire development, data collection and validation and report-writing.

Researchers who are used to the old/traditional model of research, i.e., only managing vendor-driven research (with big budgets and timelines). They see pivoting to new agile/DIY models as "beneath them" – even though this is where the industry is going.

Our company just implemented an AI task force that must approve every vendor that uses AI in any way, even if they don't use our proprietary data and this is slowing down our current research process.

Very limited budget. I make recommendations on when and how to do survey work and it is sometimes ignored, producing low response rates that they then blame me for.

Leadership

We have siloed business units/teams that often duplicate efforts – we have many different research/insights functions across different parts of the company, so making sure that we're all talking to each other and not doing the same thing can be a challenge.

Extremely bad communication of expectations (of job role, swim lanes, project needs, etc.) due to poor leadership.

Senior management dismissing the need for research and spreading that thought to his direct reports.

I'm in an org that likes to hire consultants who fake research expertise then I am called into save it. I was asked two days ago by one of them, "What's an IDI?" How about if they just say they are going to have meetings, not focus groups? Don't call that crap research.

And finally, here were some pain points that maybe aren't pain points at all!

Not enough time to meet all stakeholders that are waiting to learn about consumer insights and learn from us.

For me, as a client-side researcher, the biggest pain point is that the research is so valued that it is also feared.

Our organization is a little unique from what I've experienced and seen in the past 25 years, in that we are making MORE of an impact across the org, not less, and senior leadership recognize and prioritize our work as a differentiator in the market. Somehow, I found work with a company that is a true unicorn in this way.

Here's to finding more unicorns!

TRACKERS AS A BUILDING BLOCK TO DEVELOPING COMPREHENSIVE AND SUCCESSFUL BUSINESS STRATEGY

By Mary Emerson Baker
VP, Market Research, Suzy

As market researchers, we understand the vital role trackers play in successfully navigating the complexities of brand health, consumer behavior and market trends. The best trackers are the most actionable ones, those that serve as a single pillar within a larger initiative of comprehensive learning. To achieve this actionability and stay at the forefront of market research, it's essential to push the boundaries of how trackers are executed and used.

Trackers need the "why" to be valuable

Traditional trackers primarily focus on quantitative metrics. Without the ability to retarget respondents, brands are left with a lot of unanswered questions about any fluctuations in tracker data. In addition to tracker data, it's critical to integrate qualitative insights for a true voice of the consumer. For instance, pairing survey data with insights from focus groups or in-depth interviews can reveal the motivations behind the numbers, helping researchers identify the "why" behind shifts in brand perception or category trends and offering a deeper layer of insight.

Trackers need to be rigorous *and* fast

Real-time consumer engagement is critical for trackers to provide a continuous feedback loop. Without it, brands can't respond swiftly to consumer feedback or make adjustments. Traditional trackers typically take up to six months to set up, field and analyze, and by the time brands get their tracking data back, it's often too late to act on potentially outdated insights. At Suzy, we're speeding up the entire tracking process so brands can use real-time survey data and gather instant feedback from consumers.

Trackers need to balance consistency *and* flexibility

As consumer priorities shift, so should brands. However, many tracker suppliers are slow to adjust trackers or don't offer the ability to make any changes. While it's best not to drastically alter trackers from wave to wave, brands still need the opportunity to make shifts and additions to keep up with consumers.

Trackers shouldn't stand alone

Lastly, a tracker shouldn't exist in isolation. It should encompass a holistic view, integrating data on category trends, global events and consumer lifestyles. This comprehensive approach ensures that the insights derived are grounded in the broader context, allowing brands to make truly informed decisions. By considering external factors and real-world influences, trackers can provide a richer, more actionable understanding of consumer behavior and market dynamics, leading to more effective and strategic business outcomes.

At Suzy, we're changing the way trackers run, offering speed, actionability and integrated quant and qual all in one connected platform. With our trackers, brands can easily test product innovations, concepts, messaging and comms all stemming from tracker trends. This is tracker research that constantly informs other research, allowing for continuous, actionable learning. That is what allows a tracker to be more than just a tracker – making it a business growth driver.

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RESEARCHERS ARE EXPERIENCED AND SATISFIED WITH CURRENT ORGANIZATIONS, POSITIONS

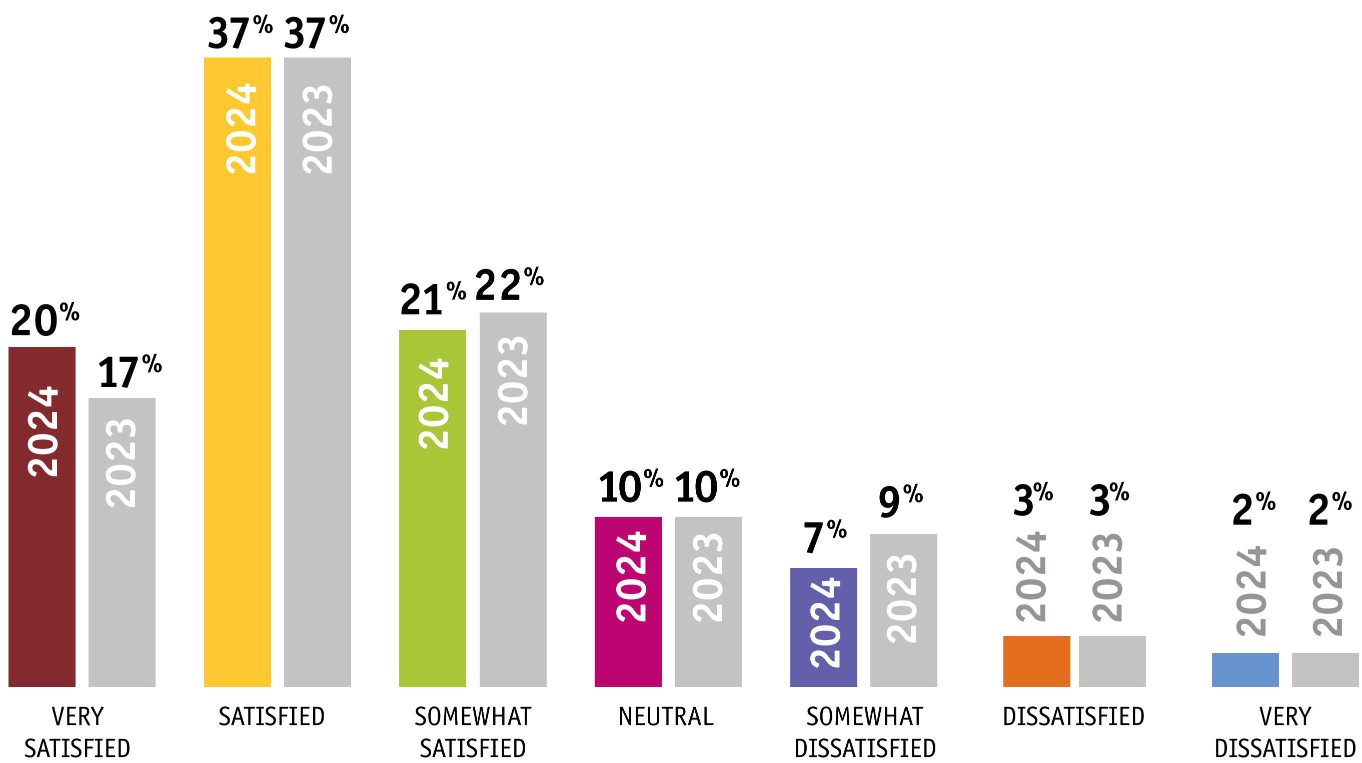
An overview of the marketing research industry in 2024

By Marlen Ramirez >> Quirk's Media

The 2024 edition of Quirk's Q Report offers insight into client-side researchers' thoughts and opinions. Quirk's has collected, shared and compared information to understand and analyze how the marketing research and insights industry has changed.

The 2024 edition of the Q Report survey received 502 usable qualified responses from full-time (defined as 35+ hours per week) client-side insights professionals from June 17 to July 23. We highlight some pieces in this issue and share respondent comments throughout but mostly let the data speak for itself.

How satisfied are you with your current employment?



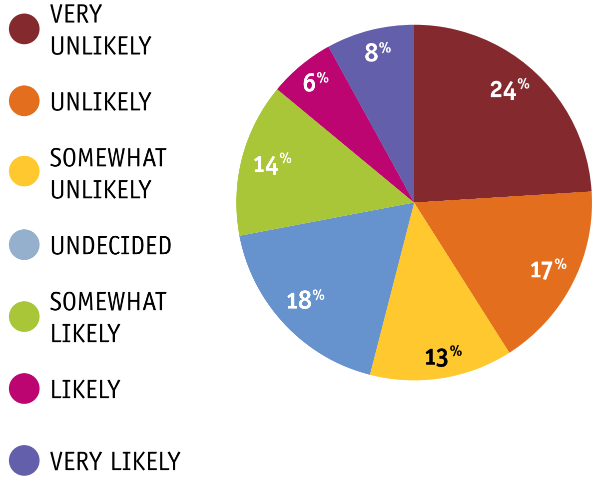
JOB SATISFACTION

Job satisfaction has stayed consistent in the past few years. Thirty-seven percent are satisfied with their current employment, 20% are very satisfied (three percentage points higher than 2023), 21% are somewhat satisfied, 10% are neutral, 3% are dissatisfied and 2% are very dissatisfied. Twenty-four percent say it is very unlikely and 17% say it is unlikely that they will seek employment at a different company this year.

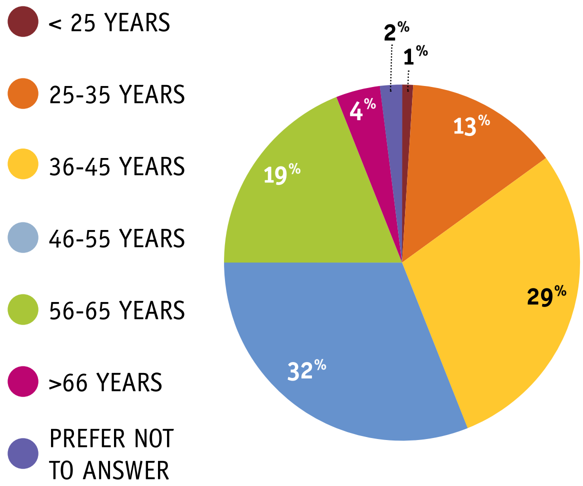
DEMOGRAPHICS

Similar to the past two years, individuals ages 36-55 dominate the industry with 29% of those being 36-45 years old, compared to 27% in 2022 and 31% in 2023, and 32% being in the 46-55 age range, compared to 36% in 2022 and 32% in 2023.

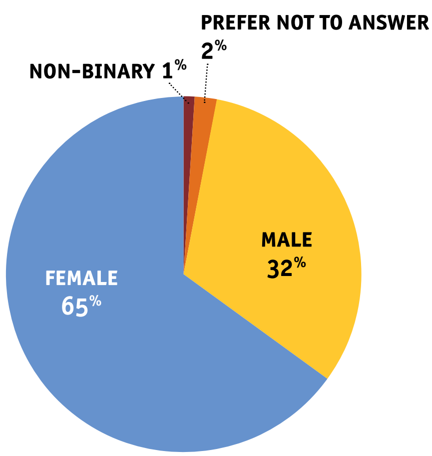
How likely are you to seek employment at a different company this year?



Age of survey respondents



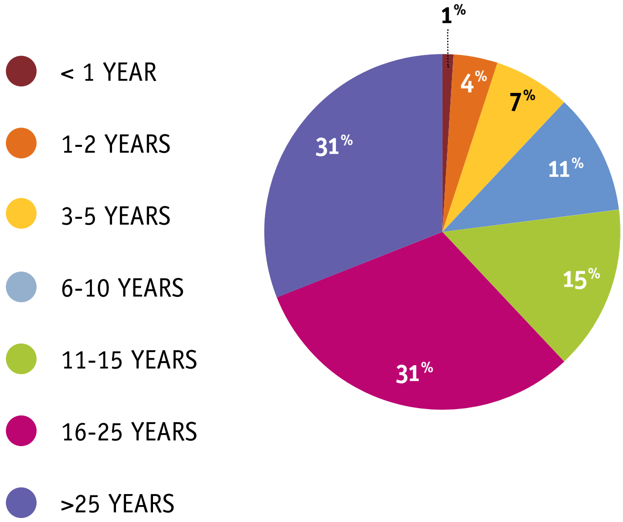
How do you identify?



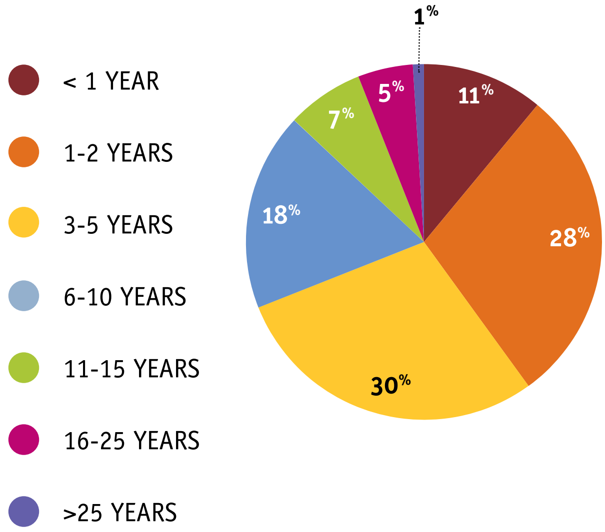
EXPERIENCE IN MARKET RESEARCH

When asked about marketing research experience, 62% of respondents had over 16 years of experience, higher than in 2022 (59%) and 2023 (55%). While a high percentage of respondents have over a decade of experience, most are in their first 10 years at their current organization.

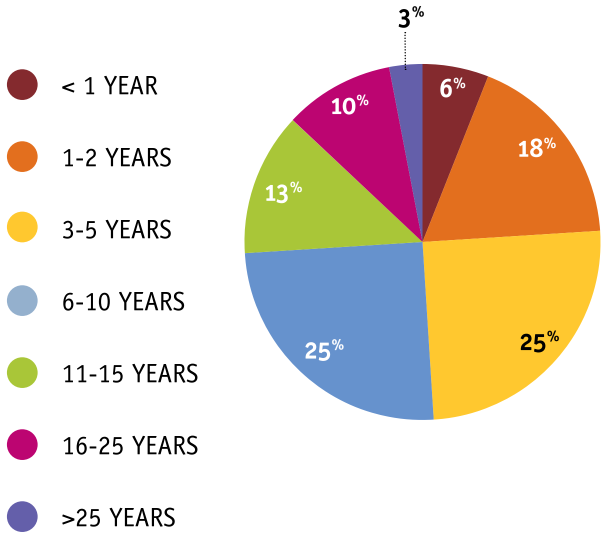
How many years of experience do you have in marketing research?



How many years have you been in your current job?



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



CO-CREATION: AI PROMPT APPROACHES THAT WORK!

By Kelley Styring
Founder and Principal Researcher,
InsightFarm Inc.

InsightFarm Inc. has a strong legacy of qualitative research and reporting for our clients. We bring strategic approaches and points of view, leading to next-generation innovations and business successes. One way we do this, year-over-year, is by delving into the latest technology through our own investment. We call these InsightFarm Learning Journeys. This year's journey has been using AI for qualitative analysis.

- **We do use** AI to pressure-test our hypotheses and identify areas for further exploration.
- **We don't use** AI as a substitute for our own analysis or as a shortcut to quick findings. It's all about co-creation!

Jump-start any analysis and take your learning to the next level!

Analysis planning: Prompt the AI to tell you the questions it would ask!

> *Example:* "Act like a market researcher (or product innovator), what prompts would you ask this data set?"
> *Outcome:* With prompts like this, you can add to your initial list of prompts for analysis.

Initial dig sites: Prompt the AI for 1) key themes and 2) sentiment, after you have your own themes identified.

> *Example:* "What are the key themes in this data set? Provide examples and quotes."
> *Example:* "What are the positive and negative sentiments expressed? Provide examples and quotes."
> *Outcome:* Initial understanding and clues for where to dig deeper in your analysis.

Inspiring solutions: Prompt the AI for strategic solutions and use a persona to tailor the answers.

> *Example:* "Act like a design engineer, industrial designer or product developer. Create five product-based solutions that would solve for key issues, themes, sentiments, in this data set." Repeat, asking for eight solutions, and look for differences.
> *Outcome:* Fresh ideas to inspire your own innovative thinking.

Starting here you can improvise and build more prompts as the responses roll in.

Don't think of the AI responses as "answers." Write your own themes first, then ask the AI for ideas. Compare the two and off you go! Each analysis is an exercise in co-creation to build insights and ideas together.

For more information on InsightFarm's innovative approaches to traditional qualitative research and tech-forward options reach out directly to our founder and principal researcher: kelley.styring@insightfarm.com. Happy to discuss!

InsightFarm is a consumer strategy and market research consultancy helping clients find new opportunities for growth. Clients include a broad range of packaged goods, technology and outdoor-active products as well as many others. InsightFarm has been featured in USA Today, PBS, Advertising Age, Brandweek, Fortune, Good Morning America and ABC News.

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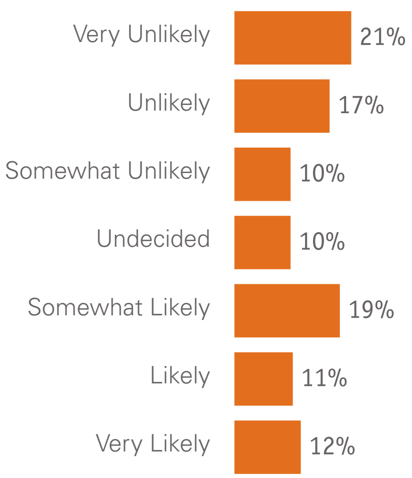
ADDITIONAL HIRES

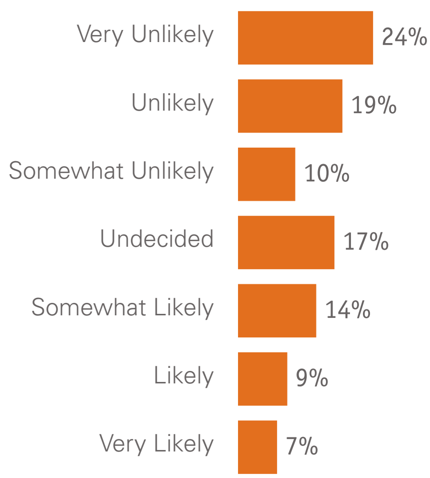
Most respondents believe there is a low likelihood of their company hiring additional permanent market research employees in the next 12 months. Twenty-one percent say it is very unlikely, 17% believe it is unlikely and 10% say it is somewhat unlikely.

Respondents are even less hopeful about their company hiring additional contract market research employees in the next 12 months with 24% saying it is very unlikely, 19% believing it is unlikely, 10% saying it is somewhat unlikely and only 7% saying it is very likely.

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



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



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 June 17 to July 23, 2024. In total we received 1,504 usable qualified responses, of which 502 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.49 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

special advertising section

6 TOP SHOPPER INSIGHTS COMPANIES

Retail is a large segment within the marketing research industry and when you are looking to connect with potential customers, it is important to have a solid understanding of the various segments, from age and income to location and gender. Being able to understand your audience can offer you deep insights into the products and services they currently buy and use and those they would be interested in purchasing and using in the future.

These companies offer a broad range of shopper insight services including pricing studies, virtual reality, package testing and immersive shopper labs, all of which allow you to gather reliable insights throughout each step of the shopper journey. Shopper insights offer valuable consumer information including their buying habits and in-store decisions and behaviors.

Decision Analyst

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

Decision Analyst offers an array of services to help clients develop and sustain winning brands. The firm melds in-depth qualitative investigations, strategic survey research, advanced analytics, mathematical modeling and simulation to solve complex marketing problems. Decision Analyst also offers customized shopping research services and can recommend the quantitative and/or qualitative technique(s) best suited to your research needs. Decision Analyst's qualitative services include in-person focus groups and depth interviews, webcam focus groups and depth interviews, time-extended online forums, online ethnography, shop-alongs, video diaries and in-vehicle videos. Quantitative services include virtual shelf sets, package testing, pricing studies, new product development, store optimization, employee research and mobile GPS. CPG is Decision Analyst's major focus that includes foods, beverages, OTC drugs and health and beauty. Decision Analyst is a leader in advanced analytics, retail sales analyses and data mining, mathematical modeling and simulation.

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Jim Jacobs CEO

Since 2015, Focus Insite has been dedicated to top-tier market research recruitment. We specialize in sourcing high-quality participants for IHUTs, focus groups and IDIs, ensuring you get the actionable insights needed to drive your business forward. As a two-time Inc. 5000 awardee, we are known for matching the perfect participants to your projects. Our mantra, "You supply the project; we supply the people," highlights our seamless recruitment approach, allowing you to focus on analyzing data. Our exceptional project managers handle every detail for smooth execution and reliable results. We offer quick bids with timely, accurate estimates to keep your projects moving. Special offer: Mention this ad and get $250 off your first project with Focus Insite or an Amazon gift card. Partner with Focus Insite to bring your shopper insights to life. Contact us now!

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Intouch Insight

Founded 1992 | 96 employees
Cameron Watt, CEO

Intouch Insight is a CX solutions company specializing in helping multilocation brands achieve operational excellence and improve customer experience so they can earn customers for life. With 40+ years of experience, Intouch is a veteran in the mystery shopping industry and stands out as one of North America's most technologically advanced providers. We are trusted by some of the world's largest and most loved brands, including six of the top 10 and 14 of the top 50 petro-convenience chains; one of the top two beverage manufacturers; four of the top 10 and 19 of the top 50 quick-serve restaurant chains; and one of the top three global technology companies. Some of the services that we offer to multilocation businesses across North America include mystery shopping and audits, reputation management, feedback and survey software, CX platform and analytics and checklist and inspection software.

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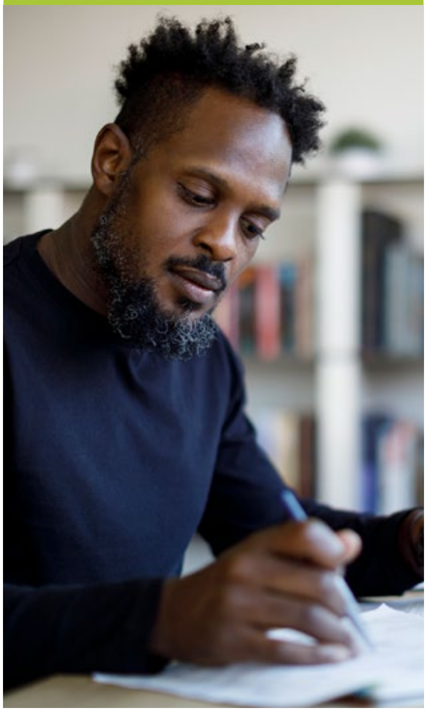

MARKETVIEW RESEARCH

MarketView Research

Founded 1999 | 25+ employees
Jessica Cardella, Senior Vice President

MarketView Research is a leader in product life cycle, consumer and shopper insights research. We provide award-winning quantitative and qualitative research that fuels the growth of today's most well-known brands. Delivering high-impact results coupled with a commitment to exceptional client service, our team is laser-focused on helping brands maximize opportunities throughout the product and shopper journeys. With Shopper Insights, we're in the trenches with consumers. We unravel the meaning behind their purchase behaviors, decision criteria and selection. We also assess key satisfaction drivers and determine where consumer's turn for information when making product and brand decisions. Whether in-store or online, point-of-purchase or post-shopping experience, we uncover the trends that matter most, giving you the leverage to create more impactful, shopper-centric experiences that stand out in the marketplace.

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QUIRK'S TIME CAPSULE

Facts and findings from nearly 40 years of Quirk's

From print to pixel

When was the last time you read a physical magazine? As reported in our June 2002 issue, many back then doubted the convenience and popularity online magazines would have. According to "Online magazines gather dust, not readers," covering a survey by InsightExpress, "Fast and free online magazines are not enough for Americans to sacrifice the convenience associated with traditional paper magazines...Publishers waiting for readers to change and opt for online over traditional magazines may be wasting their time."

Thirty-two percent claimed to read any magazines online and respondents pointed to convenience (54%), a dislike of online banner ads, pop-ups and general distractions (47%) and eye strain (23%) as the reasons why they avoided them. While many respondents emphasized their disdain for digital, with 73% saying they would not forgo physical magazines for online magazines, even for half the price, many believed online versions offered more timely content (59%).

2002

Did the internet change market data?

In "The value of market data: Does the internet change everything?," Steven Heffner pointed to a problem he noticed: "The perceived value of information is falling rapidly because of the constantly rising tide of data available for free on the Internet," he wrote, establishing that there was a major divide between reality and perception. While it is easy to find information on the internet, finding meaningful, reliable information is more labor- and skill-intensive. Heffner argued that some of the reasons for this are that "free" is a deceptive word, source reliability is a concern and that finding information may be simple but comprehending it is not.

Implications vs. recommendations

In the same issue, Jim Eschrich wrote about implications and recommendations within qualitative research findings. Two scenarios are established. In one, called Recommendations, all loose ends are tied and all questions have been answered, resulting in the client leaving with an action plan. In the other, called Implications, the questions have answers, but have prompted more questions and the client leaves with a depth of awareness as the research has "brought depth and light to an interesting subject." Eschrich argues that while recommendations are alluring, implications are the most important product of qualitative research as well as a synthesis of the two.

Searching the symptoms

What is one of the first things you do when you start feeling sick? Look up the symptoms perhaps? A 2002 Survey Monitor titled "'Cyberchondriacs' number 110 million nationwide" dove into Harris Interactive's survey results focusing on individuals who turned to the internet to find health care information. Eighty percent of all adults who were online would sometimes use the internet to look for health care information and, on average, they did so three times every month. Individuals were using established academic, governmental or pharmaceutical websites rather than using e-health sites.

Scan to access all Quirk's back issues.

RACE AROUND THE WORLD FOR EDUCATION MREF

The insights industry joined the Marketing Research Education Foundation (MREF) to race around the world for education. Together, we logged more than 72,000 miles and raised $70,000+ to promote educational opportunities for children.

Congratulations to our top finishers!

Biking:

1. **Haroon Mir**, *Ipsos*, 1,244 miles
2. **Alana O'Mara**, *CMB*, 990 miles
3. **Chris Tucker**, *Sago*, 925 miles

Running:

1. **Jason Martuscello**, *BEESY*, 400 miles
2. **Ethan Frank**, *Olson Research Group*, 300 miles
3. **Christopher Chan**, *Emporia Research*, 201 miles

Walking:

1. **Robin Ventura**, *MarketVision Research*, 322 miles
2. **Haroon Mir**, *Ipsos*, 313miles
3. **Denise Vanga**, *Fuel + Focus Room*, 274 miles

We are grateful to our generous race sponsors

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We'll be racing again in 2025! Visit MRGivesBack.org for details.

CALENDAR OF EVENTS

••• can't-miss activities

Insights Association will host the Corporate Researchers Conference on **September 17-19**. Visit www.insightsassociation.org.

Strategy Institute will host Data Analytics for the Public Sector on **September 18-19**. Visit www.dataanalyticspublicsectorsummit.com.

WBR will host eTail Connect Autumn on **September 24-25** in **London**. Visit https://etailconnectautumn.wbresearch.com.

Quirk's Media will host Quirk's Virtual – DIY Research on **September 25**. Visit www.quirks.com/events/quirks-virtual-diy-research-2024.

WBR will host eTail Australia Connect on **September 24-25**. Visit https://etailconnectaustralia.wbresearch.com.

Strategy Institute will host Customer Experience for Financial Services on **September 24-25**. Visit www.cxfinancialservices.com.

WBR will host eTail Toronto on **September 25-26**. Visit www.etailcanada.wbresearch.com.

Pharma CI Conference and Exhibition will host its USA Conference & Exhibition on **September 25-26**. Visit www.pharmaciconference.com.

MRS will host the Behavioural Science Summit on **September 26**. Visit www.mrs.org.uk/event/conferences/behavioural-science-summit-2024.

IQPC will host the Customer Analytics Exchange Los Angeles on **September 24-26**. Visit www.intelligentautomation.network/events-customeranalyticsexchange.

GreenBook will host IIEX Latin America on **September 25-26**. Visit https://events.greenbook.org/iiex-latam.

Empresarial will host Le Printemps des études on **September 26-27**. Visit www.printemps-etudes.com/en/accueil-english.

We.CONECT Global leaders GmbH will host CIMICON Evolution 2024 on **October 6-8**. Visit www.competitive-market-intelligence.com.

Forrester Research will host B2B Summit EMEA on **October 7-9**. Visit https://www.forrester.com/event/b2b-summit-emea/.

IQPC will host the Generative AI Week on **October 7-9**. Visit www.aidataanalytics.network/events-generative-ai-week.

Informa Connect will host TMRE 2024 on **October 8-10** in **Orlando**. Visit https://informaconnect.com/tmre/.

Richmond Events will host the Richmond Market Insight Forum USA on **October 10**. Visit www.richmondevents.com/forums/details/inu24.

Merlien Institute will host MRMW Germany on **October 10-11**. Visit https://eu.mrmw.net.

Forrester Research will host the Technology & Innovation Summit EMEA on **October 9-11**. Visit www.forrester.com/event/technology-innovation-emea/.

Corinium Global Intelligence will host CDAO Malaysia on **October 15**. Visit https://cdao-my.coriniumintelligence.com.

WBR will host eTail Germany Connect on **October 16-17**. Visit https://etailconnectgermany.wbresearch.com.

Corinium Global Intelligence will host CDAO Fall on **October 15-17** in **Boston**. Visit https://cdao-fall.coriniumintelligence.com.

Corinium Global Intelligence will host CDAO Europe on **October 16-17**. Visit https://cdao-eu.coriniumintelligence.com.

GIA Global Group will host World Data Summit 2025 on **October 16-17**. Visit https://worlddatasummitasia.com.

Event details as of July 25, 2024. Please see websites for more details.

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

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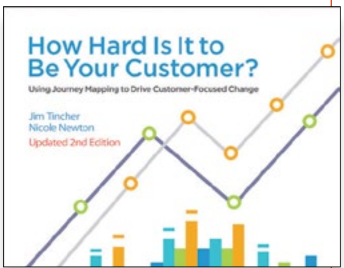

208 pages, 11x8.5, 978-1-941688-75-5 $42.00 paper/color illustrations

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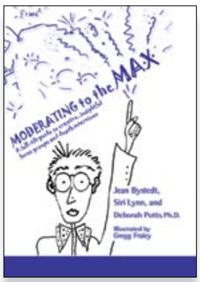
Detailed instructions for more than 20 techniques that will deepen focus group findings and bring life to a fading group. From perceptual mapping to personification, you will never again have to guess whether a technique is the right one for the occasion. Full of examples and illustrations, the book's emphasis is on "play": how fun exercises can inspire focus group respondents to reveal deeper motivations.



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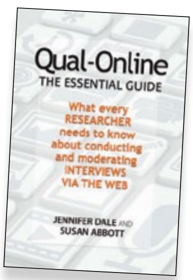
Qual-Online: The Essential Guide

What Every Researcher Needs to Know about Conducting and Moderating Interviews via the Web

This extensive guide will help you understand the sequence of steps to follow, timing, and costs involved and help you manage all of the useful insights you will gather—making your job of sharing information with your client that much easier and your reports more robust. *The* must-have guidebook.



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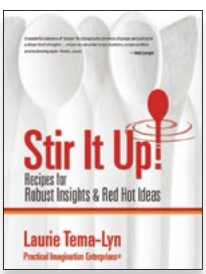

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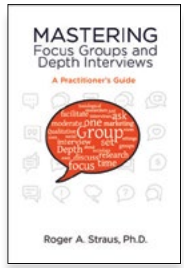

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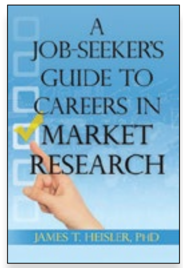

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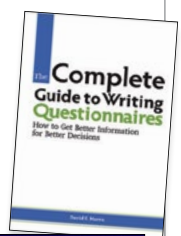

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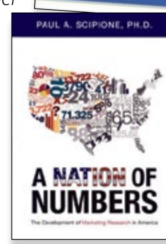

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What makes consumer insights a compelling career choice for young professionals today?

I didn't want to be a consumer insights strategist when I was a kid. I didn't even know what consumer insights was until I got a job in the marketing department of a large media company. However, I believe that consumer insights is a fantastic career choice for young professionals today. For starters, the discipline is a perfect blend of art and science. It's a highly creative field, but also grounded in hard science. Successful companies tend to be very customer-driven so that squarely puts voice-of-the-customer teams in the driver's seat ... The consumer insight professional's ability to tell stories with data is a fundamental skill set that can catapult their career.

How does qualitative research maintain its value in a world increasingly dominated by big data and AI?

I'm a huge qualie. Before I had the job I do now, I moderated focus groups. I learned about qualitative research before I immersed myself in quantitative to become a better researcher. I encourage anyone grappling with this question to read the book "Small Data," by Martin Lindstrom. It's a great read. In the book, Lindstrom reinforces the notion that researchers are like detectives, solving business problems and issues, one mystery at a time. Qualitative research is fantastic at teasing out latent and often hidden motivations. Quantitative surveys, AI and big data are all fantastic tools. However, most of our custom studies have both a qualitative and quantitative component. There is no substitute for practicing deep listening with customers. AI, as great as a development it is, will only strengthen the need for genuine human connection and understanding.

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

Sure. We talk a lot about democratization of insights. Basically, it means putting the insights in the hands of the decision makers. That can take many forms. The PowerPoint debrief should be one of many arrows in the researcher's quiver. Insights can be shared via dashboards, scorecards and other innovative ways. It could even be a video deliverable or a full-page infographic. It doesn't always need to involve a researcher either. Part of it involves making a small leap of faith. You have to overcome the fear that, if you give them the data, they won't need you anymore. In my experience, it's quite the opposite. You can democratize the insights, but it doesn't take away that your function is both the owner and the expert on the data set. That usually means lots of questions and interactions. And that means relationship building. And that means influence.

To me, the goal of any insights function worth their salt is to influence the organization in which they reside to maximize and improve the customer experience, outperform competition, grow sales and gain market share. That said, you must earn your seat at the table. Great researchers also need to be fluent in the language and discipline of business. You need both.