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For marketing research and insights professionals

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PLUS The diagnostic odyssey of rare-disease patients

Preventing failure in CX tracking studies

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Outlook 2020

ADVERTISING SECTIONS

14 Top International Research Companies

10 Top Product Development and Testing Companies

Quirk's Marketing Research Review
January/February 2020
Volume XXXIV Number 1
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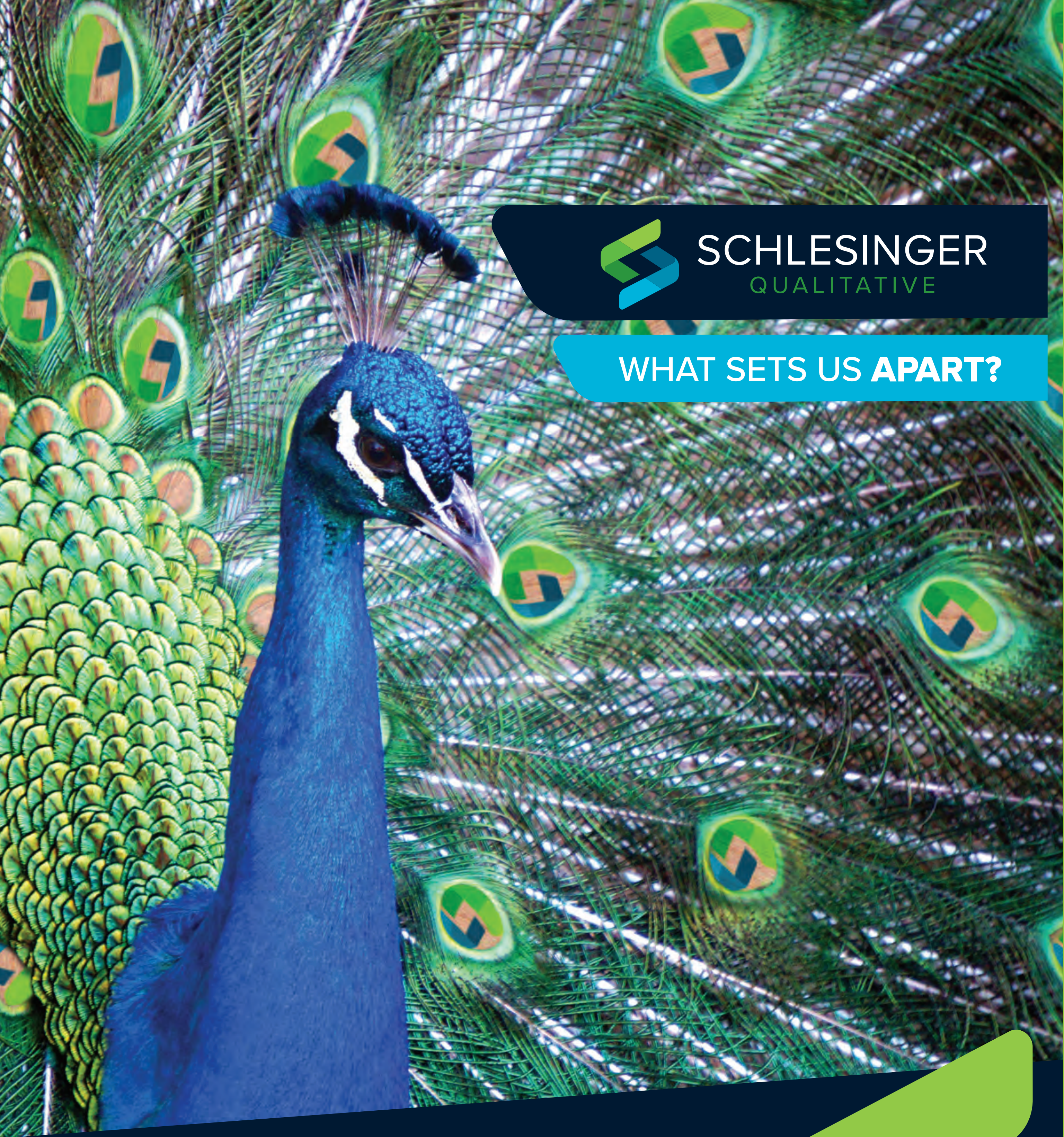
SCHLESINGER
QUALITATIVE
WHAT SETS US APART?

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ON THE COVER

FEATURES

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JANUARY THROUGH DECEMBER 2020

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RESEARCH METHODS

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Orlando	Jan 22-24	Las Vegas	Sept 1-3
Phoenix	Mar 23-25	Cincinnati	Oct 12-14
Philadelphia	May 12-14	Nashville	Dec 2-4
Chicago	July 20-22		

RM03 - Designing Effective Questionnaires: *A Step by Step Workshop* $2,925

Las Vegas	Feb 25-27	Philadelphia	July 7-9
Chicago	Apr 28-30	Cincinnati	Sept 15-17

RESEARCH APPLICATIONS

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Phoenix	Mar 26-27	Cincinnati	Oct 15-16
Chicago	July 23-24		

RA03 - Market Segmentation & Positioning Research $2,925

Cincinnati	Feb 19-21	Charleston	Oct 20-22
San Jose	July 28-30		

COMMUNICATION

C01 - Writing & Presenting Marketing Research Reports: *Insights, Storytelling, Data Visualization* $2,925

Cincinnati	Mar 31-Apr 2	Chicago	Aug 18-20
Phoenix	June 2-4	Philadelphia	Oct 27-29

DATA ANALYSIS

DA02 - Tools & Techniques of Data Analysis $2,925

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Cincinnati	June 2-4		

DA03 - Practical Multivariate Analysis $2,925

Philadelphia	Mar 31-Apr 2	Chicago	Nov 17-19
Phoenix	July 14-16		

QUALITATIVE

Q01 - Moderator Training: *Focus Groups & IDIs* $3,475

Cincinnati	Feb 11-14	Cincinnati	Sept 29-Oct 2
Cincinnati	Apr 21-24	Cincinnati	Dec 8-11
Cincinnati	July 14-17		

Q02 - Specialized Moderator Skills for Qualitative Research Applications $3,475

Cincinnati	Mar 3-6	Cincinnati	Oct 20-23
Cincinnati	June 16-19		

Q03 - Next Generation Qualitative Tools: *Social Media, Online Communities, Virtual Research Platforms* $2,575

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••• events

Cutting-edge insights at the Quirk's Event

The Quirk's Event – held in London (February 11-12), Brooklyn, N.Y. (March 3-4) and Chicago (April 6-7) – is a two-day event packed with sessions to give your team an edge. At the event you will find quality, relevant content presented by leading researchers from innovative client- and supplier-side companies.

Here are just a few of the 250 companies that will be speaking at the 2020 events:

- Verizon
- Fidelity International
- PBS
- MassMutual
- Johnson & Johnson
- Fabletics
- Harry's
- Cargill

Looking to register or learn more? Visit www.TheQuirksEvent.com.

••• get published

Write for Quirk's in 2020!

Between our magazine, e-newsletter and blogs, Quirk's has a variety of outlets for authors! We are always looking for interesting, objective submissions on all aspects of marketing research.

To submit an article for consideration, send materials to Quirk's Editor Joseph Rydholm at joe@quirks.com or to Quirk's Digital Content Editor Emily Koenig at emilyk@quirks.com. Submission guidelines and Quirk's 2020 editorial calendar are available at https://www.quirks.com/pages/write-for-quirk-s.

// E-newsworthy

The power of psychology for CX data
quirks.com/articles/2019/20191225-1.aspx

Putting a price on customer defection
quirks.com/articles/2019/20191225-2.aspx

11 brand mistakes companies are still making
quirks.com/articles/2019/20191225-3.aspx

// Noted Posts

Quirk's Blog

Retail therapy? Study reveals female clothes buying behaviors
https://bit.ly/344R15B

Mascot matchup: The most memorable brands
https://bit.ly/2YDfQEH

Jeff Bezos claims 'market research doesn't help'
https://bit.ly/2P4WTaL

Research Industry Voices

Myth of the global consumer
https://bit.ly/36f1psU

Leveraging AI to support sales and marketing campaigns
https://bit.ly/2RxSPl7

Corporate social responsibility: Assessing value internationally
https://bit.ly/354HNHP

Research Careers Blog

Get comfortable with discomfort: 8 steps to embrace disruption
https://bit.ly/2LBg0Y4

Recovering from interview failure: a guide
https://bit.ly/33YPGNO

Losing the right candidate to the wrong questions
https://bit.ly/2PqbrRk


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••• consumer psychology

Appearances do matter, apparently

People make split-second judgements about a person's competency based on their own perceptions of the person's clothing, according to a study led by Princeton University researchers. If the clothes look "rich," the person is perceived as more competent than if the clothing looks "poor." These judgements are made immediately and are very hard to avoid.

Participants saw the images for three different lengths of time, ranging from about one second to approximately 130 milliseconds, which is barely long enough to realize one saw a face. Ratings remained consistent across all time durations.

Across studies, the researchers found that economic status – captured by clothing cues – influenced competency judgments. This persisted even when the faces were presented very briefly, when information was provided about a person's profession or income, when clothing was formal or informal, when participants were advised to ignore the clothing, when participants were warned there was no relationship between clothing and competency and when they were offered a monetary incentive for making judgments independent of the clothing.

"To overcome a bias, one needs to not only be aware of it, but to have the time, attentional resources and motivation to counteract the bias," the researchers noted. "In our studies, we warned participants about the potential bias, presented them with varying lengths of exposure, gave them additional information about the targets and offered financial incentives, all intended to alleviate the effect. But none of these interventions were effective."

www.quirks.com/articles/2020/20200101.aspx

••• health care research

Put more care in health care

The health care system is not meeting the needs of the people who need it most, according to a new study, as reported by Tracey Walker, managing editor of Managed Healthcare Executive. Based on nine focus groups of low-income consumers with complex health and social needs, In Their Words: Consumers' Vision for a Person-Centered Primary Care System, from the Center for Consumer Engagement In Health Innovation, found a strong desire for supportive services they do not get now, such as: an ongoing relationship with a trusted provider; a coordinator or navigator who can help them manage their care, connect them to social services and advocate for them when needed; a broader conversation with their primary care provider, not just focused on their medical treatment, but exploring the needs of the whole person; providers with greater cultural sensitivity and empathy; and a centralized place which would include mental health care and supportive services in addition to primary care (a "one-stop shop"). "Consumers expressed the desire for a primary care relationship that is not necessarily tied to a credential [e.g., an MD] but rather one that is rooted in empathy for the significant challenges and barriers this population faces in their day to day life," says Ann Hwang, director of the Center for Consumer Engagement in Health Innovation.

The road ahead

Perspectives from Adam Froman of Delvinia

What opportunities do you see in MR in the next year?

The year ahead will bring big opportunities in the areas of data security and privacy. Increased consumer protections for Personally Identifiable Information (PII) such as GDPR and CCPA – combined with the requirement to implement higher standards for data security via ISO certifications including ISO 27001 – situate the MR industry for a renaissance in the collection and delivery of consumer data for organizations to glean the insights they need to make better business decisions. With the increased use of AI and machine learning, the pursuit for faster, cheaper and better research has never been closer. 2020 will be a great year for the market research industry.

What challenges do you see in the next year?

There will be significant instability globally in 2020, marked by contested elections in key markets like the U.S., an uncertain future for the EU following Brexit and a potential global recession. For companies like Delvinia that are continuing to invest in innovation and market growth, it's important to be conscious that while the market for innovative data collection solutions continues to grow, companies need to temper growth with managing the instability in the markets. While I am optimistic about the demand for innovative market research solutions, I am also concerned that a negative turn in the economy would lead to spending cuts across all industries and would have a significant negative impact on those of us that are actively investing in our growth.

What are you and your company excited about?

I am most excited about the continued growth and further adoption of our Methodify research automation platform. We continue to invest in our platform to meet our clients' customized needs and we are also integrating our investments of CRIS and PersonaPanels into our platform, as well as establishing more technology partnerships like Knowledgehound and Bloomfire to enable broader access for our clients. We are looking forward to an exciting year ahead as we continue to demonstrate our market leadership in innovative and repeatable research solutions. With that will come the need to provide change management support to many insight professionals who are looking to take a more active role in adopting innovative solutions in their organizations and are managing through them the increased demand for data security and privacy. We are leading the way in using market research to meet the insight needs of the digital age. This extends beyond simply selling our products or services – it means bringing change management to our clients and partners in valuable and measurable ways that allows them to customize for their business.

methodify by delvinia

methodify.it
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hello@delvinia.com

www.quirks.com/articles/2020/20200166.aspx

By Joseph Rydholm, Quirk's Editor

You'll be seeing less of us – but also more

Like many media companies whose legacy product is a print publication, we have seen our display ad sales decline steadily in recent years. The rise of digital advertising has already hastened the demise of the print versions of consumer stalwarts such as Redbook, Glamour and ESPN The Magazine and here in the business-to-business publishing realm it's no different.

And, as with other B2B media firms who seek to offset declining ad sales by leveraging the close relationships that niche publications have with their audiences, Quirk's jumped into the event space, starting in 2015 with our Brooklyn Quirk's Event and eventually expanding to three cities (Brooklyn, London, Chicago) last year and for 2020. The events have been wonderfully successful and we have been gratified and humbled by the support from attendees and exhibitors, which has allowed us to keep the magazine going despite the shifting ad-buying landscape.

Still, it's been clear for a while that some changes were necessary with the magazine. Thus, starting with this January/February edition, our 2020 publishing schedule will consist of six combined-month issues (along with our annual Researcher SourceBook, which will be mailed with the September/October issue).

Beyond the decreased frequency, you'll no doubt notice a few changes, the biggest one being the absence of the Names of Note, Research Industry News and Product and Service Update sections. The growing popularity of our Daily News Queue – our business-day e-mail blast of the latest MR-related goings-on which delivers the same content found in those sections in a much timelier fashion – coupled with an even longer gap between issues made including those sections in the print magazine seem, well, kind of silly. (News junkies fear not: You can sign up for the free Daily News Queue and Weekly News Queue at https://bit.ly/2qWeXKB and we will also publish compilations of recent news and post them to our website each month.)

While the issues will be fewer, they will be bigger. We hope to fill the pages that previously held the every-issue departments with more of the articles readers have told us they find most valuable – the case studies, the explorations of methods and techniques, the overviews of best practices.

Another factor behind the reduced issue output is changing media consumption habits. With more and more content to consume, from more and more outlets, readers don't always have time to pore over a print magazine. (Though on that front, I've appreciated the many, many kind readers who have told me that they save their issues of Quirk's for situations like long plane rides where they do have blocks of open time. One woman even told me that she takes Quirk's with her on vacations and that on a recent get-away, while she sat reading an issue, her husband asked, "Are you working?!" "No," she replied, "I just really enjoy reading the articles!")


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Joe Rydholm can be reached at joe@quirks.com

I recognize that fewer but bigger issues doesn't exactly reduce the reader's burden but when coupled with our fine e-newsletter, which is ideally suited for shorter and/or more timely articles, and our lineup of blogs, our goal is to deliver marketing research-related content in a range of forms – and all still free of charge, as usual.

Ability to adapt

One of our company attributes of which I am most proud is our ability to adapt. Of course, it helps that we are a small and nimble organization of just 10 full-time employees – with no committees or other bureaucratic layers to bog down launching new endeavors or adjusting to market realities. We've also had the good fortune to partner with similarly responsive companies and organizations who share our enthusiasm for delivering quality and value to our readers and the industry as a whole.

As always, I welcome your comments on the changes to the magazine. If you have stories or topics you'd like us to cover, please let me know!

www.quirks.com/articles/2020/20200102.aspx

ASK THE EXPERT

Expert answers to important research questions.

What is the best way to create an effective mystery shopping program?

Ensure everyone is on board

Before attempting to launch a mystery shop program, think through the various people and departments it may affect – from human resources and training to marketing and every level of management. It's vital for everyone in the company to understand that the purpose of the mystery shop program is to improve the specific behaviors that will create customer delight and positively impact sales and profitability. Clearly explain why you believe a mystery shop program will help the company and how the results of the shops should be used. Share your plan with as many departments as you can and ask for their partnership.

Partner with a leading mystery shopping company

There are hundreds of companies offering mystery shopping services and it can be overwhelming when faced with choosing one partner out of the crowd. There are many variables to consider when choosing a provider, but three elements stand out as critically important:

- exceptional quality-assurance processes;
- vast geographical coverage;
- availability of internal IT resources/customizable software solutions.

Create a manageable survey

You'll likely have several people and/or entire departments who are excited to get the mystery shop program started and who want to contribute to questions included on the shop form. Your mystery shopping company should be able to help you turn your survey question wish list into a survey that is both actionable and focuses on performance where it matters most. An effective form will allow you to distinguish delighting behaviors from very good or fine behaviors as well as dissatisfying behaviors from customer-detracting behaviors. This is critical to the success of your program.

Use the results to drive improvements

If you have gained your buy-in up front with the right internal partners, they will be ready to institute process changes based on the results of the shop. Also, the customer-facing associates will be ready to listen to and act upon the positive and constructive feedback the shop results provide. In order to make the results as actionable as possible, it is imperative that the results are clear, easy to digest and focused. Many companies go through the process of collecting customer feedback and/or mystery shop data but then find that they are overwhelmed by the massive amounts of data and they aren't sure what to do next. Your mystery shopping provider should be able to help you determine the best way to report and summarize your data.

If successfully executed, a mystery shop program will provide insight into your customers' experiences, measure your company's proficiency at providing memorable customer experiences and help align your company's focus on consistently exhibiting the key behaviors that result in customer delight, customer loyalty and improved sales and profitability.

Dana Stetzer
CEO
BestMark
dstetzer@bestmark.com

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Have a question you'd like to have answered? Submit it to info@quirks.com.
Want your firm to be featured as an expert? Contact sales@quirks.com for more information.www.quirks.com/articles/2020/20200155.aspx

Q // Survey Monitor

••• affluent research

A wealth of opportunity

Engaging the high-income consumer

According to a GlobalWebIndex article by Sam Ernest-Jones, higher income and readiness to spend make affluent consumers desirable targets for brands across a range of sectors. This group – defined as those who sit within the first quintile of characteristics relating to wealth, educational achievement, working status, vacations, device ownership and car ownership – shows engagement beyond the luxury market with opportunities in areas such as sports, gambling, motoring, business, economy and finance.

Who are these affluent consumers?

www.quirks.com/articles/2020/20200103.aspx

A survey by GlobalWebIndex shows that this group is both image-conscious and ambitious, being 50% more likely to fall into both the "cosmopolitan" and "status-seeker" segments than the average internet user. They value well-respected brands that will elevate their position among their peers, with 69% saying they tend to buy the premium version of a product. Only 6% of this cohort fall into the "economical" segment, occupied by those who seek value for money above all else from their purchases. This shows that affluent consumers prioritize brand status over the practical value of the product.

Affluent consumers have high ambitions in both their personal lives and careers. Seventy-six percent of this group say they're motivated to be the best they can be, which aligns with their desire for higher-value products and status-elevating items. Affluent consumers are also highly career-motivated, with 71% citing career progression as a key ambition. This statistic, along with the 64% who state investing money as a goal, highlights the likelihood of this cohort being high earners as well as seeking financial security.

Product quality is the primary factor that motivates the affluent consumer to advocate for a brand at 52%. Rewards such as discounts and free gifts come in second at 41%, despite the fact that value for money is not prioritized by this group. Great customer service is the third-most powerful advocacy driver at 37%, alongside a love for the brand. Just under a quarter say that a brand's role is to make you feel like a valued customer.

Social media is an important brand touchpoint for internet users but it's especially crucial for affluent users, 59% of whom are heavy users of social media. In this respect, affluent consumers reflect the global trend in social media usage. They're using the platforms less to engage with friends and increasingly to watch sports and research products.

Facebook is a popular platform for affluent consumers, with 86% owning accounts. YouTube comes in a close second at 81%. Similarly, visual search content platforms like Pinterest and Instagram both see an overindex when compared with internet users overall. This group is 58% more likely to have entered a competition by sharing a photo or using a hashtag related to a brand on Instagram in the past month.

For affluent consumers, mobile is now the device of choice when it comes to online purchasing with 65% using a mobile device to purchase a product online in the last month. Because this group is more likely to own the latest devices, they're in a good

position to pay for items online using mobile technology, although PC/laptops (47%) and tablets (17%) still play a significant role when it comes to purchasing products online.

Search remains the most powerful means of brand discovery for this group, with 40% claiming this is how they find new brands. Similarly, 49% say search is how they research products and services. More traditional advertising channels are also effective for reaching this group, TV ads and word of mouth being the second-most cited sources of brands discovery at 34%. Thirty-seven percent of affluent consumers use social media to research brands, while 27% discover brands from recommendations and comments via social media.

The survey was conducted by GlobalWebIndex and polled 138,952 online respondents ages 16-64 from 45 different countries.

••• millennials research

A year in Millennial diets

Study explores dietary tastes and trends

According to Good News Network, Millennials have a unique relationship to food, reportedly spending about a month-and-a-half per year on food-related activities such as meal-prepping, cooking and eating out. The survey, commissioned by Sweet Earth Foods, polled 2,000 Millennials on their diets to examine tastes and trends.

It follows that for a group that spends 1,140 hours a year on average on food, diet is an important consideration – 57% of Millennials currently subscribe to a special diet. For those who follow a special diet, 44% do so because it's better for the environment, while 37% say it's more ethical. Food consideration is a priority for Millennials – so what does a year in Millennial food habits look like?

The study found that Millennials spend $2,242 at the grocery store and $1,672 dining out over the course of a year – averaging $187 and $139 per month, respectively – and they also try an average of 46 new foods. Millennials reported making 17 tweaks or changes to their diet per year, with the top changes found to be eating healthier foods (46%), avoiding sugar/carbs (41%) and focusing more on plant-based foods (36%). That's in addition to one-third (34%) of participants who have cut down on their meat consumption. Of those 1,140 hours that Millennials spend on food-related tasks, they devote 183 hours to purchasing food, 238 hours to prepping and planning meals, 326 hours to cooking, 160 hours to deciding where to eat and 233 hours to actually eating food. On average, they share 47 photos of their food on social media over the course of a year.

A year in food for Millennials also includes 41 dinner parties and eating out 90 times – split evenly between friends and with dates – as well as 52 frozen meals. Not all Millennials are choosing to eat out, however. Some are held back from eating out more often because of a lack of time (37%) or because of a lack of money (37%), while 42% of Millennials report eating healthier when they cook for themselves. Three-quarters (74%) of those on a special diet find it more difficult to eat at restaurants – and 59% of respondents feel like there's judgment to ordering and buying foods that subscribe to a special diet.

When Millennials prepare meals at home, they find food inspiration from a variety of sources, with their friends (49%), parents (46%) and cookbooks (44%) in the top three – beating out more modern methods of finding recommendations such as social media.

When it comes to what they eat, Millennials' top priorities are cost (48%), having it be full of nutrients (46%) and no artificial additives in their food (40%). This is followed by organic food (39%) and having it be plant-based (37%). Considering these concerns, it's no surprise that 57% of Millennials follow a special diet. Respondents pointed to a number of reasons for their diets, although the top reason was that following a special diet was healthier for their body (67%), followed by a desire to lose weight (53%), concerns about health problems and illnesses (48%), concerns for the environment and sustainability (44%) and a desire to be more ethical (37%).

The study was conducted by OnePoll on behalf of Sweet Earth Foods and surveyed 2,000 U.S. Millennials, defined as those who were born between 1981 and 1996.

••• consumer survey

Viva la vino

Survey shows American attitudes toward wine

New research from YouGov has confirmed what many living in the United States already know: Americans like wine. According to the study, most Americans (60%) enjoy at least the occasional glass of wine. About one-third (34%) drink wine at least once a month, though Millennials (46%) and those who live in urban areas (43%) are especially likely to consume wine this often.

What kind of wine is America drinking? Red wine (69%) is the most popular among wine-drinking adults, though majorities also say they like white wine (65%) or rosé (55%). Among wine drinkers, the most popular kind of reds are merlot (19%), cabernet sauvignon (18%), pinot noir (12%) and zinfandel (12%). As for the white wine list, moscato (23%) tends to be the most popular pick. Chardonnay (17%), riesling (14%), pinot grigio/gris (13%) and sauvignon blanc (11%) are other popular varietals. When it comes to rosé wines, about one in five (19%) say they don't have a preference. But zinfandel rosé tends to be the most popular, with 33 percent of rosé-drinkers claiming it as their favorite type.

But for most Americans, the varietal isn't the most important thing when it comes to choosing wine. Two-thirds (66%) of wine-drinking Americans say that when they're purchasing a bottle, price is one of the most important factors. More than one-third (36%) say that the brand is important, while 24 percent say the alcohol percentage is something they care about. Region, vintage and varietal are slightly less important factors at 20%, 17% and 17%, respectively.

Just over one in five (21%) say that the reviews are one of the top three factors they care about when making a wine purchase, while 16% say the same about the bottle/label design. With cost being one of the most important factors among wine-drinkers, it's unsurprising that most Americans are looking to spend less than $20 when they buy a bottle of wine. One-quarter (24%) say they typically aim to spend less than $10 when buying a bottle of wine. A plurality (44%) aim to spend between $11 and $20, while just 23 percent of wine drinkers say they typically aim to spend more than $20.

One potential reason Americans may look to less-expensive wines: most don't believe they personally can tell the difference between expensive and inexpensive wines. Over half (57%) are not very confident (23%) or not at all confident (34%) that they would be able to distinguish between a $5 bottle of wine and a $100+ bottle of wine in a blind taste test.

Millennials (43%) are more likely than members of Gen X (30%) or Baby Boomers (33%) to say they believe they could taste the difference between the two. But a larger number of Millennials (49%) are not confident that they would be able to tell the difference. Men (15%) are more likely than women (9%) to say they are "very confident" they could tell the difference between an inexpensive wine and an expensive wine.

The study was conducted by YouGov and polled 1,179 U.S. adults 21 years and older.

••• gen z research

Challenging the binary

Gen Z leans away from gendered pronouns and products

According to research by the J. Walter Thompson Innovation Group, 56% of Gen Zers know someone who uses gender-neutral pronouns such as "they," "them" or "ze." This is a notable increase from Millennials, 43% of whom know someone who uses gender-neutral pronouns.

In keeping with these findings, Gen Z is challenging the gender binary, with over a third of respondents strongly agreeing that gender does not define a person as much as it used to – as compared to 23% of Millennials. Only 44% reported that they always bought clothes designed for their own gender and 77% of Gen Z supports public spaces providing access to gender-neutral bathrooms.

Just 48% of respondents reported that they were completely heterosexual, while 35% rated themselves as somewhere along the spectrum of bisexuality; another 6% responded that they were completely homosexual. The majority (65%) of Millennials reported that they were completely heterosexual, which reflects the 60% of Gen Z who strongly agree people are exploring their sexuality more than in the past. Millennials largely agree with this statement too (53%), perhaps seeing this change reflected in their younger cohort.

Gen Z doesn't necessarily shop within the gendered products targeted to them, with a minority buying such clothing (44%), deodorant, (42%), fragrance (39%), shoes (39%), accessories (37%) and sports equipment (19%).

This cohort also shows a certain self-awareness when it comes to issues of gender and sexuality, with 74% of respondents agreeing that they are more accepting now of people of nontraditional gender identities than they were a year ago. About half or more of Gen Z has seen or heard of the terms transgender (84%), queer (72%), asexual (69%), pansexual (59%) and genderfluid (49%), while fewer have seen or heard of genderqueer (33%), non-binary (28%), cisgender (28%), demisexual (23%), graysexual (18%) and aromantic (18%). Only seven percent had not heard of any of these terms.

Given that so many of Gen Z know someone who uses gender-neutral pronouns, there appears to be a gap between showing support for individuals and having the correct terms to describe their orientation and gender identity. This is reflected in the gap between those of Gen Z who have heard or seen the listed terms and those who are familiar enough with them that they could define them for a parent or someone who has never before heard the words. Sixty-nine percent of respondents could define "transgender," but this number drops for terms such as asexual (39%), queer (37%), pansexual (35%) and genderfluid (28%).

While Gen Z's don't necessarily have a wide familiarity with gender and sexuality terms, the study showed that they have an awareness for the LGBTQ community and current issues that affect them such as gendered bathrooms and pronouns, as well as a comfort with their own sexuality that rivals previous generations. Brands wishing to engage this cohort should consider not only individual gender identities and preferences but also Gen Z's attitude toward gender-exclusive products and businesses.

••• mothers research

An update on the modern mom

Checking in on motherhood trends

According to recent research by Pew Research Center, U.S. women are more likely now to become mothers than they were a decade ago – particularly highly educated women.

The share of women at the end of their childbearing years (ages 40 to 44) who had ever given birth was 86% in 2016, up from 80% in 2006. This was similar to the share who were mothers in the early 1990s. Over the past 20 years, highly educated women have experienced particularly dramatic increases in motherhood. In 2014, 80% of women ages 40 to 44 with a Ph.D. or professional degree had given birth, compared with 65% in 1994.

The shares of women who were mothers also rose among those with bachelor's or master's degrees during this period, while rates of motherhood remained steady for women with less than a bachelor's degree, at 88%.

Women are becoming mothers later in life – the median age at which women become mothers in the U.S. is 26, up from 23 in 1994. While this change has been driven in part by declines in births to teens, delays in motherhood have continued among women in their 20s. In 1994, more than half (53%) of women in their early 40s had become mothers by age 24; by 2014, this share had fallen to 39%.

Mothers are spending more time in the labor force than in the past but also more time on child care. In 2016, moms spent around 25 hours a week on paid work, up from nine hours in 1965. At the same time, they spent 14 hours a week on child care, up from 10 hours a week in 1965. Dads, too, are spending more time on child care.

Seven in 10 moms with kids younger than 18 were in the labor force in 2015, up from 47% in 1975. In fact, mothers are the primary breadwinners in four in 10 U.S. families. In 46% of households with a mother and father, both parents are employed full time, up from 31% in 1970.

About one in four mothers are raising their children on their own. While most U.S. mothers are married (68%), nearly one-quarter (24%) are solo moms. All told, about 9 million mothers are living with a child younger than 18 without a spouse or partner. Solo parenthood is far less common among fathers; 7% of dads are raising a child without a spouse or partner in the home. A relatively small but growing share of moms are living with an unmarried partner. In 1997, 4% of mothers were cohabiting, and by 2017 that share had doubled to 8%.

Americans say women face a lot of pressure to be involved mothers. Even in an era where women make up nearly half the U.S. workforce and men are more involved in housework and child care than in the past, the public sees vastly different pressure points for women and men in today's society. Roughly eight in 10 adults (77%) say women face a lot of pressure to be an involved parent; a significantly smaller share (56%) says the same about men. In contrast, most adults (76%) say men face a lot of pressure to support their family financially, while only 40% say women face this type of pressure.

Awards gala *was a* NIGHT TO REMEMBER

This past November, nearly 300 marketing research professionals gathered in New York for the inaugural Marketing Research and Insight Excellence awards gala to celebrate the industry's best and brightest. The 2019 finalists and winners were honored at a red-carpet, black-tie affair emceed by late-night TV guest comedian Moody McCarthy.

Spanning 16 categories, the awards shine a much-deserved spotlight on the researchers, vendors and products and services that are adding value and impact to market research. Both individual and team achievements are recognized along with awards for best projects, MR tools and those who give of their talents to make the world a better place. Selected by a panel of independent judges within the marketing research industry, the winners represent the best of the best, having competed with more than 150 other nominations.

The awards would not have been possible without the support of our generous sponsors: Toluna, Trusted Talent, Ipsos, Zappi, Hall & Partners, Confirmit, Civicom, Voxpopme, QRCA, Sekstant, distillery, Schlesinger Group, Fuel Cycle, OvationMR, Methodify by Delvinia and our partners the Market Research Council and the Marketing Research Education Foundation (MREF).

The 2019 Marketing Research and Insight Excellence Award winners

RESEARCHER OF THE YEAR END-CLIENT • Tony Foleno, Ad Council
RESEARCHER OF THE YEAR SUPPLIER • Laura Radosh Butt, LBR Insight
MARKETING RESEARCH SUPPLIER, 2018 REVENUE AT OR ABOVE $10 MILLION • LRWGreenberg
MARKETING RESEARCH SUPPLIER, 2018 REVENUE BELOW $10 MILLION • Kadence International
CLIENT-SIDE TEAM (DEPARTMENT OF 10 OR MORE RESEARCHERS) • Herbalife Nutrition
CLIENT-SIDE TEAM (DEPARTMENT WITH FEWER THAN 10 RESEARCHERS) • Disney Channels Worldwide
GLOBAL MARKETING RESEARCH PROJECT • Microsoft and EyeSee
NONPROFIT/SOCIAL ENTERPRISE RESEARCH PROJECT • Magenta
GROUNDBREAKING RESEARCH PROJECT • Dstillery
B2B RESEARCH PROJECT • Cox Automotive
BEST NEW PRODUCT/SERVICE • Hall & Partners
MARKETING RESEARCH IMPACT • Cox Automotive
OUTSTANDING YOUNG RESEARCHER END-CLIENT • Elizabeth Saulsbury, Cox Automotive
OUTSTANDING YOUNG RESEARCHER SUPPLIER • Carolina Starkhammar, Kadence International
MREF PHILANTHROPIC COMPANY OF THE YEAR • 20|20 Research; Sklar Wilton & Associates
MREF EVERYDAY HERO • Claire Kuhn, InSites Consulting

The following awards were also presented at the gala:

MARKET RESEARCH COUNCIL HALL OF FAME
Alice Sylvester, Sequent Partners; Gian Fulgoni, comScore

MARKET RESEARCH COUNCIL AWARD FOR ACADEMIC EXCELLENCE
Steven Licari, Michigan State University

Nominations for 2020 open on March 30. Visit www.QuirksAwards.com to view the expanded list of categories and upcoming deadlines.


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OUTLOOK 2020

COMMENTARIES BY INDUSTRY LEADERS ON THE YEAR AHEAD

Welcome to Quirk's Outlook 2020! We asked research companies to offer up their viewpoints on a range of topics – from the value of machine learning to face-to-face research methodologies – to delve into some factors that will make an impact in the year ahead.

Facts 'n Figures discusses upcoming trends in the Internet of Things and how qualitative research still plays an important role. Curion explores product testing in real-world settings and how it can encourage authentic responses. Olson Research tackles the quality versus speed dilemma in health care research. Murray Hill National looks into the changes and challenges facing respondent recruiting in the coming year. B2B International looks at the emotional factors in the B2B path-to-purchase. Toluna provides background into agile research and the race for faster, smarter insights. Applied Marketing Science delves into the applications of AI and how it can benefit researchers. FocusVision argues that brands with strong CX strategies will rise to the top. Confirmit shows how automation presents an opportunity to research practitioners, not a threat. Precision Opinion discusses a holistic approach to surveying that could save time and money. InnovateMR suggests five questions to ask your sample provider for better-quality sample. InsightFarm provides examples of dynamic in-person research. And Emotional Logic details applications for behavioral economics.

We hope this section will provide a glimpse into 2020 and a sample of tips and tricks to help make this year a success!

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QUIRK'S OUTLOOK 2020

QUALITATIVE RESEARCH

FACTS 'N FIGURES

Coming trends in the Internet of Things

IoT offers big opportunities but qualitative research is still key

BY STEVE ESCOE
CEO, Facts 'n Figures

The Internet of Things (IoT) has led to unprecedented access into and intimate understanding of human behaviors. There are billions of devices gathering trillions of useful data insights into consumers' wants and needs in everyday life. Everything from relatively mundane tasks to the mapping of entire human genomes are being collected, categorized and stored as massive data pools every second of the day. These data pools are accessed by smart-device intermediaries that serve as the conduit for which companies can provide a more customized experience to their consumers, at scale. There has never

been a more luminous time for the insights industry to explore such vast amounts of untapped data pools of human behavior.

In the world of big data as it relates to the insights industry, IoT is one of those transformational forces that will shape the future of the business in 2020 and beyond. As businesses seek opportunities to deliver dynamic and customized experiences to their customers, many firms in the insights industry see big opportunity in IoT uses to unlock the promise to enhance customer relationships and drive business growth by improving quality, productivity and reliability while reducing costs and project risks.

With all this in mind, some might question whether qualitative research is still necessary. Qualitative research has always been a small part of the market research industry compared to quantitative research. However, qual still has a place in the research toolkit. In addition to its stand-alone role of generating deep consumer insight, qual has always fulfilled an additional and fundamental role – delivering the "why" behind quantitative research and data trends. By having the right IoT model coupled with qualitative and quantitative best practices, companies will be rewarded with new customers, better insights and improved customer satisfaction, to mention just a few benefits.

Let's explore some of the trends of IoT impacting the insights industry and technology in 2020:

1. The convergence of blockchain and IoT

Blockchain is more than a concept now and has applications in many verticals – most notably fintech – including IoT. Blockchain technology is considered by many experts as the missing link to settling scalability, privacy and reliability concerns in IoT. Blockchain technology can be used in tracking billions of connected devices; enables the processing of transactions and coordination between devices; and allows for significant savings to insights industry researchers. This decentralized approach would eliminate single points of failure in data collection and validation, creating a more resilient ecosystem for research to be conducted. The cryptographic algorithms used by blockchain would make consumer data more private. In 2020 IoT will converge with blockchain for better security and privacy, opening the door for a new category in applications, hardware and respondent talents.

2. Many mobile moments as a result of IoT

IoT is creating new opportunities and providing a competitive advantage for businesses in current and new markets. It touches everything – not just the data but also how, when, where and why you collect it. The technologies that have created the Internet of Things aren't changing the internet only but are changing the things connected to the internet. More mobile moments (the moments in which a person pulls out a mobile device to get what he or she wants, immediately and in context) will appear on the connected device, right from home appliances to cars to smartwatches and virtual assistants. All these connected devices will have the potential of offering a rich stream of data that will then be used by the insights industry to help product and service owners find and dive deeper into the data to uncover the hidden answers that will help them improve they how interact with their consumers.

3. Containers, IoT and artificial intelligence.

In an IoT situation, AI can help companies take the billions of data points they have and boil them down to what's really meaningful. The general premise is the same as in the retail applications – review and analyze the data you've collected to find patterns or similarities that can be learned from so that better decisions can be made.

The year 2020 will see IoT software being distributed across cloud services, edge devices and gateways. The year will also witness IoT solutions being built on modern microservices, an approach to application development in which a large application is built as a suite of modular services. Each module supports a specific business goal and uses a simple, well-defined interface to communicate with other modules. These solutions will also be built on containers (lightweight virtualization) that would work across this distributed architecture. Further, machine-learning cloud services and artificial intelligence will mine the data that comes in from IoT devices.

4. IoT and connectivity

Connecting the different parts of IoT to the sensors can be done using different technologies including Wi-Fi, Bluetooth, low power Wi-Fi , Wi-Max, regular ethernet, Long Term Evolution (LTE) and the recent promising technology of Li-Fi (using light as a medium of communication between the different parts of a typical network including sensors). This allows for a dependable, scalable, ubiquitous and cost-effective solution for companies who want a rapid deployment of robust appliances that can be used to capture data on- or off-site.

5. Talent shortage in IoT

Organizations launching IoT projects face a tougher time in recruiting talent. Complicating matters is that it remains a challenge to find enough workers to secure IoT. Most companies engaged in IoT struggle to find security professionals and others are having difficulty finding digital insights professionals who understand the digital landscape. In 2020, major industry vendors will invest in IoT training and certifications and make it part of mainstream training programs in the tech industry. The insights industry should follow this trend as well.

6. The new business models created by IoT

2020 will see new categories and research methodologies being added to smart markets. One key element is to bundle service with the product. For example, devices like Amazon's Alexa will be considered just another wireless speaker without the services provided like voice recognition, music streaming and booking Ubers, to mention a few. There are several firms that have legions of programmers writing code to distribute Amazon Alexa-enabled prompts and functions designed to collect data specifically for the insights industry.

The road ahead

From refrigerators to parking spaces to smart houses, IoT is bringing more and more things into the digital fold every day, which will likely make IoT a multi-trillion-dollar industry in the near future. One possible outcome in the near future is the introduction of "IoT-as-a-service" technology within the insights industry. If that service is offered and used the same way we use other software-as-a-service technologies today, the applications in research will be unlimited.

However, respondents are more than a collection of data points. The power of face-to face meetings is irrefutable. Qualitative research brings the human element to a data-driven world. That is not to say that qualitative research doesn't have its own "big data" challenges. IoT promises the ability to vastly improve the quality, capture and analysis of data.

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QUIRK'S OUTLOOK 2020 IN-CONTEXT RESEARCH

curion
Consumer Insights. Delivered.

Insights in context

Consumer insights are most authentic when product testing happens in real-world settings

BY SEAN BISCEGLIA
CEO, Curion Insight

Brands rely on consumer testing to analyze potential risks and rewards before launching a new product or a product line extension or when changing the way they market the brand. This typically takes place in a test kitchen or lab, where consumers participate in blind studies. The environment is clean and clinical.

While clean and clinical certainly has its place in product testing, we also know that products are used in real life, not in a booth. So, we decided to take product testing to where the consumer lives. Where they work. Where they exercise. Our LifeLabs™ program makes that possible. LifeLabs™ is a contextual testing approach that works in gyms, popular bars, theaters, restaurants, senior residential communities and any place consumers go to mingle, relax and work.

Would you rather taste a new craft beer in a test kitchen or while relaxing on a sunny outdoor patio? Does popcorn taste the same way in a lab as it does in a living room while watching the big-screen TV? Does the tropical smell of sunscreen have the same appeal indoors as it does on the beach?

Product testing out of the lab brings the experience to the consumer's life, enabling researchers to understand the brand in a context that is more real than central location testing.

The on-demand future is here. People eat anytime, anywhere (think Uber Eats). They order online and get one-day delivery. Consumer expectations are "you bring it to me." As an example, consumers can now simply click and get an LA-style fitness class brought right to the recumbent bike in their family room. For all these reasons and more, Curion decided to take product testing to consumers.

Responding to market disruption

Consumers drive change – the result of new technologies, cultural shifts and the rapid reversal of social norms. Let me put it another way. Everybody was on Facebook until everybody was on Instagram. Everybody ate macaroni and cheese until salt and carbohydrates became a health threat. Everybody smoked until vaping replaced cigarettes. Now even that's in question. Everybody drank soda out of plastic bottles or cans. Now global awareness of how we pollute the oceans is changing the way we think about packaging.

What's driving consumer preference? How do they view brands? What can we expect?

Recent consumer research shows these alpha trends as we head into 2020:

- Social media is driving a thirst for new products. "Food brands need to take bigger risks…innovate fast and

frequently."

- Expect "New textures in food and beverage options."
- Brands need to step up food innovation much like what we're seeing in the meat and dairy alternative categories.
- We will continue to see Millennials and Gen Z lead the charge to cut salt, sugar and artificial ingredients. This opens the door to spicy, more exotic alternatives – a hot topic for the younger demographic.
- Anything packaged with plastic is at risk as consumers become more and more tuned into the environment. Brands will need to be meticulous in the ways they communicate their sustainability message – on the pack and online.

Contextual research is the subject of the Current Opinion in Food Science article "Thinking outside the booth," which states, "Moving sensory and consumer research from the standard sensory booth setting closer to where consumers actually purchase or consume the products being tested may thus increase a test's ecological validity. It is well established that consumer responses to the same foods can differ, depending on the setting or location where these foods are tested."

Through LifeLabs™ we can also conduct product studies in virtual reality rooms, where consumers come in contact with mock-up environments. This lets people see what a product might look like on a store shelf. We can track the purchasing process and evaluate how the product holds up against competitors as participants "shop."

LifeLabs™ – testing a product and a method

Recently, we performed at test within a leading shared office space provider. This was an ideal fit for our client, a popular protein bar brand in the health food industry that sought to understand how their nutrition bars stood up to the competition.

Part of the research was to determine the differences between traditional lab testing in a CLT setting versus LifeLabs™. Our mission was to understand how consumers' responses might differ in the context of real life – in this case, during meal times in a natural work environment.

Results from the traditional study versus the LifeLabs™ study were compared to determine how context affects consumer perception.

Consumer preferences between products were similar between both studies. However, participants in the shared office test site showed far more enthusiasm for the experience and were far less critical of the products compared to those in the standard CLT study. LifeLabs™ participants were also more articulate and nuanced in their answers to the survey questions.

The advantages of contextual research

According to the many studies named in the Current Opinion in Food Science, these results imply that the more immersive the context is when studying consumer perceptions, "The closer a panelist's responses may be to those obtained within the real world."

As we begin to expand our partnerships with brands, we are finding that contextual research delivers a wealth of advantages and allows brands to:

- Get closer to the consumer in the environment of their chosen lifestyle.
- Allow for natural biases.
- Understand product usage in real time.
- Gain context-rich insights on how everyday habits affect preference.
- Test prototypes early before going into production.
- Find the moments you own and the ones you don't.
- Define the product's position in the market.
- Develop a product and then perfect it while understanding the consumer.

To learn more about Curion Insights and the LifeLabs™ Program, visit https://curioninsights.com

At Curion, we provide world-class insights. From quantitative to qualitative research, we apply proven, industry-leading, innovative methods to service over 65% of Global 100 companies. As a full-service product and sensory insights firm, we work with our clients to determine not only what products consumers like but also why they are liked and how to make optimizations. As a result, our clients mitigate the risk of marketplace failure by ensuring that only products of quality and character will be introduced to the market, providing repeatable delight to their consumers.

We accomplish this with our expert employees, sensory processes, fully-equipped facilities and data insights. In 2019 alone, we tested 105,000 consumers across our San Francisco, Chicago, Dallas and New York metropolitan-area facilities.

QUIRK'S OUTLOOK 2020

HEALTH CARE/MEDICAL RESEARCH

Olson Research Group, Inc.
Healthcare Marketing Research
Leading the Industry Since 1995

Quality as a differentiating factor

As the margins of speed and cost narrow, research quality will set providers apart

BY LYNN WELSH
Chief Research Officer, Olson Research Group

Over the past five to 10 years, the number of research firms that include the ability to conduct primary research in the pharmaceutical or health care market in their list of client offerings has steadily increased. Primary reasons for the increase of health care marketing research providers include the proliferation of health care respondent panels, resulting in an apparent ease of access to targeted respondents; the leveling of the playing field that advances in technology provide; and the decreasing cost of this technology, mainly in the form of panel management and data collection platforms.

As a result of these developments, providers have been in a race to be the fastest or the cheapest provider of health care research. From a client perspective, the argument can be made that the increased competition has been a net positive for their research function, as healthy competition among providers in any industry spurs decreases in both cost and delivery times.

However, being the fastest and the cheapest is only a preferable scenario if you are running a factory. When your product is a commodity, the faster you can produce a widget at a lower cost will allow you to increase

market share and rise above your competition. But health care research – or any other type of research – is not widget-making. In the race to be the fastest and the cheapest, the focus on research quality has been overlooked.

As margins of speed and cost grow razor thin, resulting in near parity among providers, the differentiating characteristic among health care marketing research firms will increasingly default to the level of quality.

Quality encompasses more than simply the end product, for final data and the conclusions drawn from it are only sound if the means and methods of collection are also sound. Health care marketing research, like all specialized disciplines, requires experience, diligence and subject-matter expertise in order to be successfully executed. There are particular and vital nuances in recruitment, fieldwork and validation evident in health care research that are not present in other types of research.

Thus it is the quality of the entire research engagement that matters, and in three distinct areas:

- Project initialization: accurate market feasibility, verified respondents.
- Fielding: health care expertise in the presentation of topics and survey design, anticipation of potential fielding challenges and proactive solutions to overcome.
- Results: 100% clean, verifiable data, validation of results and recommendations and insights in context.

In initializing a project, accurate feasibility sets the research up for success and this is where a quality, experienced health care marketing research partner can offer an advantage over other research firms. Feasibility within health care segments is unique and challenging. Whether targeting rare disease sufferers, specialist physicians prescribing particular treatment regimens or payers working with specific health care organizations, a reputable firm working in the health care space can draw on years of past experience to gauge specific feasibility with reliability and confidence. Moving beyond assessing feasibility, access to the appropriate research respondents is vital. The existence of a standing panel of respondents will not guarantee quality respondents. Reputable health care research firms should have an understanding of each health care demographic and a relationship with respondents that extends beyond the digital world. Verification of credentials and identity are essential, as is a personal touchpoint at the conclusion of the research engagement. While online recruitment and digital fulfillment of research incentives such as gift cards or pre-paid credit cards may promise efficiency, these practices also increase fraud risk. Given that incentives for physician research in particular can be steep, having confidence in the relationship between your health care research provider and their respondents is important and protects your research investment.

In quantitative engagements, the way questions are presented to respondents is important, and in health care surveys, often the complexity or specific nature of topics requires a keen eye toward presentation of information. In addition, exactly how topics are introduced and explained necessitates a fielding partner who understands the therapeutic environment and can make suggestions for best practices. Experienced health care agencies anticipate potential fielding challenges and suggest adjustments to variables that can overcome any challenges. From past experience in particular health care demographics, workarounds or new paths can be suggested as ways to keep momentum. Providing interim data for clients to check ensures the final deliverable is presented in the most usable format.

Clean, validated data is the product of the foundational principles of quality built into the initialization and fielding of the project. Quality data is the most visible result of a well-executed research endeavor and allows for the development of accurate recommendations and next steps. Working with the client team, the research agency can produce insights that are not only actionable but draw from previous or established learnings and can be integrated with institutional knowledge.

While cost and speed are factors controlled solely by the fieldwork provider, quality is a more elusive target and will require clients and fieldwork agencies to work in partnership. Here are a few suggestions on how clients can help ensure there is a focus on the quality of the research engagement:

- Provide finalized specifications and project parameters so that feasibility and project timelines can be set. The more information that the client team can impart to the research agency at project initialization, the more the team will be set up for success.
- Communicate clear research objectives and disclose specifically how the findings will be utilized for decision-making. This provides necessary research context and can also spur suggested best practices for ensuring objectives are met.
- To place value on quality, purchasers of health care research should understand the relationship between provider and respondent, how compensation is handled and how fraud is prevented.
- Be available to make quick decisions based on fielding actualities. Be open to changes in project scope that may be necessary to achieve the project objectives.
- Review interim data and reporting and confirm any necessary manipulation or adjustments.

Of course, time and money will continue to be driving factors in the execution of research. Budgets are a reality of any business and health care research providers will need to continue to work with clients in this area. Similarly, we know that market events and occurrences drive our clients' challenging timeframes and we need to be diligent about delivering on time. In addition, clients are in an unenviable position as insights functions are continually being tasked with doing more with less money. Instead of seeking out the cheapest option, the focus should be on the smartest option and this can be achieved by being open to a partnering relationship with a research provider, where one successful project builds upon the next.

As health care research marches forward into 2020 and beyond, there will be new techniques and technologies to uncover customer sentiment, perceptions and decision-making available in the researcher's toolbox, replacing older methods. What will remain constant are the three inevitable parameters of cost, time and quality. Research providers have greatly diminished any distinction in the case of both cost and time. Thus, the race to be the fastest or the cheapest research option will end as the commoditization of health care data collection reaches a tipping point. Going forward there will be a resurgence of the primary importance of data quality and both health care research providers and their clients will be better for it.

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QUIRK'S OUTLOOK 2020 RESPONDENT RECRUITING

MURRAY HILL NATIONAL

What to expect when you're recruiting – finding respondents in 2020

Recruitment methods may change but the skills required do not

BY SUSAN OWENS
President and Owner, Murray Hill National

Are you overwhelmed by the sheer volume of respondents who seek you out to take part in your research – for free? Me, neither. Respondent recruiting exists as a field for the sole reason that respondents really do require recruiting and those within the field work to discover the perfect recipe of creativity, technology, tenacity and incentives to find the right respondents. At Murray Hill National, we've spent over 20 years perfecting our own recipe and we've learned a thing or two along the way.

What are some of the main issues or factors currently affecting recruiting?

A persistent factor that will always affect respondent recruiting is obtaining correct sample. If researchers don't ensure that respondents are fully vetted before being presented to the client, we risk jeopardizing both the project at hand and the working relationship with the client. Every database is home to a pool of respondents whose presence naturally skews the data – repeat respondents, cheaters, professional respondents.

Understanding the weaknesses of your recruitment process and taking steps to remedy them can help ensure a reliable sample while reinforcing your company's reputation as a dependable recruiter. Solving these issues all comes down to honing your process – awareness of persistent factors will enable you to constantly check quality and catch issues when they arise.

Are you seeing or worried about high refusal rates?

Refusal rates typically vary depending on the type of study and the targeted audience. Recruiters have to dig deep and get creative when drafting invitations to a panel – don't underestimate the value of a thoughtful approach. Generic invitations won't necessarily be successful when your audience itself is not generic, so it's best to narrow in on the specific types of groups that you are trying to reach well before sending out invitations or calling.

Additionally, ensuring that the individuals you are reaching are actually within your target audience is critical. Initial refusal rates can be dramatically reduced by contacting the correct audience and making the topic and assignment as detailed, informative and interesting as possible.

What has been the impact of the rise of mobile phones on recruiting?

The proliferation of mobile phone usage has been an enormous opportunity, although it comes with its own set of unique challenges. Nearly everyone has a mobile phone, meaning nearly everyone carries with them an access point. This fact alone makes this method easier than others in recruiting respondents. However, recruiting via mobile phones has similar challenges to other forms of recruiting – the need for TCPA compliance being at the forefront. We now need to ensure that potential respondents have opted in to being contacted first, which adds an extra step to the recruitment process.

We've also found that people are much more likely to change phone numbers (and much more quickly) than they were when landlines were the main method of telephony. Recruiters should also keep in mind that some respondents may have differing views of an offer's legitimacy when they are contacted by text message as opposed to a traditional phone call. Despite the extra considerations involved when contacting respondents via mobile, this method has been

an incredibly valuable avenue for recruitment.

How has technology helped in the recruiting of respondents?
Technology has had a massive and pervasive effect on respondent recruiting. As mentioned above, the widespread adoption of personal tech like mobile phones means that we can reach a wide array of respondents. E-mail, also, has brought about a huge improvement in recruiting because of its widespread adoption. Additionally, recruiting via e-mail means that we can send a pre-qualification survey to accurately execute an initial sort of potential respondents. These surveys let us ensure that our respondents legitimately meet our qualifications and also allow the respondents to let us know if they are interested in the study. Technology has revolutionized the way recruiters can connect with potential respondents – in more ways than can be adequately covered by this article. Ultimately, though, technology offers increased efficiency and accuracy to an endeavor that thrives from both.

Have you noticed any trends regarding incentives? Do they have to be higher these days? Do respondents expect them?
Respondents definitely do expect incentives. The form and amount of the incentive vary depending on time, methodology and the type of respondents one is trying to recruit. For example, incentives offered to consumers will look very different from what is offered to B2B respondents, executives and health care providers. Incentives truly act as compensation for time and data and when recruiting respondents whose time and data are very valuable to them, companies will need to offer a bigger payout.

Respondent recruiting is a process that will always be under some form of growth or change – the shifting landscape of technology, data and our relationship to them ensures this. Some aspects of recruitment remain static, however, even as methods change. The best recruiters will always be professional, well-spoken and tenacious. Consistent creativity along with tech and social media savvy will help recruiters stay on top of a field that experiences some inconsistency and change. At Murray Hill National, we adhere to those values and look forward to the ways in which our field will grow in 2020.

Murray Hill National is one of the leading data collection and recruiting companies in the U.S. We're committed to providing cost-effective, top-notch and on-time market research services through a variety of qualitative and quantitative methodologies. We are centered in the heart of Dallas but our recruiting spans the nation, providing clients with a diverse and robust respondent database for a multitude of industries such as B2B, technology, health care and consumer projects.

www.murrayhillnational.com

QUIRK'S OUTLOOK 2020

BUSINESS-TO-BUSINESS RESEARCH

B2B International a gyro: company

Let's get emotional!

The crucial role of emotional decision-making factors in the B2B path-to-purchase

BY JUDITH WIEGHARDT
Marketing Manager, B2B International

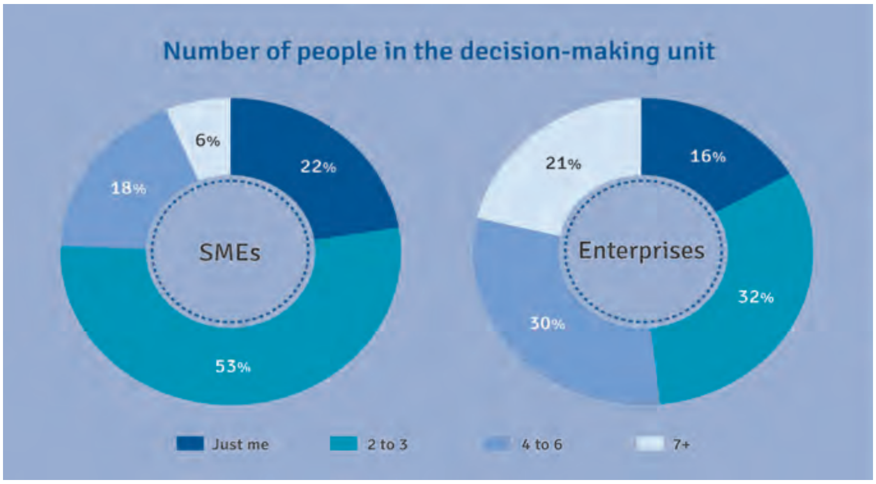
"People will forget what you said and did, but they will never forget how you made them feel."
– Maya Angelou

What factors influence B2B buying decisions? Are B2B buyers merely driven by rational factors, such as product features and price? Or do emotions matter as well? These questions stand at the very core of B2B marketing and market research. While it's long been accepted that consumers succumb to cognitive biases and irrational behaviors when making buying decisions, to date the perception prevails that decisions of B2B buyers are purely driven by rational thought. But is that so?

To shed light on the matter, B2B International conducted a study among 2,000 decision makers in the U.S., Europe and Asia.1 Within the study, we analyzed factors that influence the buying decision along the different stages of the B2B path-to-purchase and ultimately, the factors that matter most in the race for gold. What we found was remarkable: 56% of the final purchase decision is based on emotional factors. Rational factors need to be satisfied for a supplier to enter the consideration set but what really counts in the end is the emotional connection to the supplier and its brand.

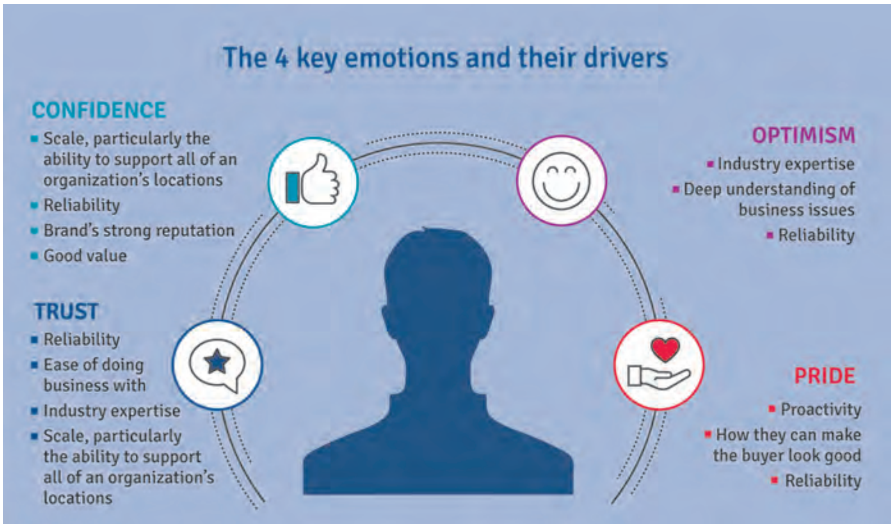
What makes B2B markets special?

Before delving deeper into the specific factors that determine B2B buying decisions, let's look at some of the key characteristics that differentiate B2B from B2C markets:



- **Higher risks.** B2B purchases tend to entail higher personal risks for the purchaser. They are often associated with significant business investments and therefore bear a strategic and financial risk for the whole organization. If buyers make a bad purchase decision, they run the danger of not only sacrificing their time and credibility but potentially also their job. Due to this risk, trust in the supplier plays a crucial role.
- **Larger decision-making units.** Decision-making units (DMUs) in B2B markets tend to be larger than in consumer markets. According to our research, the average B2B purchasing decision is made by a group of three to four people. The bigger the company, the wider the sphere of influence. More than half of all B2B enterprise businesses (with more than 250 employees) in our research had a DMU of four or more people. Therefore, it's key to emotionally connect with the whole influencer network.
- **Longer buying cycles.** Considering the risk involved with many B2B purchasing decisions and the size of the DMU, it's no surprise that B2B purchase decisions tend to take longer than most consumer decisions, particularly those in FMCG markets. Our research found that the average B2B buying decision takes just over 12 days. While dealing with suppliers, B2B buyers often heavily engage with their brands and sales teams. So, a connection develops that, like any relationship, involves an emotional component.

Those characteristics are some of the fundamental reasons why decision makers are in fact heavily influenced by emotions when making buying decisions. But which emotions play a role?



Emotions as differentiators

Our research revealed that four distinct emotional factors play a role in the final purchase decision. While the early stages of the customer journey are mainly determined by rational factors (more on those shortly), the final decision is an emotional one. Using regression analysis, we examined the relative importance of certain rational and emotional criteria. Evoking these four emotions alone increases the chances of winning business by 50%:

- **Trust** (in the supplier's credibility): Trust in the credibility and authenticity of the supplier is paramount. Those who succeed in building trust during the first customer contact and bid often have a clear lead in the final purchase decision.
- **Confidence** (in the supplier's ability to deliver): The second important emotion is confidence in the supplier's ability to deliver the service or product offered. As mentioned, there are risks associated with many B2B purchases. Therefore, it is up to the provider to convey that the agreed terms will be met in full.
- **Optimism** (about what they could do for the buyer): In addition, the provider should make the customer optimistic about their partnership and make them feel that they will thrive working with the supplier.
- **Pride** (in the prospect of partnering with the supplier): Finally, a B2B customer should feel proud of partnering with a supplier. Larger brands might find it slightly easier to create this sense of pride due to their high awareness levels; however, even smaller companies can succeed in evoking pride by positioning themselves as a true expert in their category.

How to elicit the four key emotions

The research revealed a number of different factors that play a role in forming these key emotions.

Meeting the rational hygiene factors. Following the regression analysis which identified the key emotions, we carried out driver analysis to find out more about their origin. The analysis revealed that the four emotional factors are in fact almost entirely based on rational factors (see below). However, while they play a crucial role in the earlier stages of the path-to-purchase (particularly during the research stage), when it comes to the final decision they are merely hygiene factors.

Trust is driven by consistent reliability, demonstrated expertise, a seamless customer experience and the ability of the supplier to support the buyer in all locations. Confidence in the supplier's ability to deliver is mainly determined by scale, reliability and a solid brand reputation. Optimism is again the result of a supplier's expertise in their market, including their ability to understand and solve any issues the buyer might face, and reliability. Finally, the golden rule to elicit pride is to make the customer look good in front of their peers and to be reliable and proactive.

Providing an excellent customer experience. According to our research, the incumbent experience with a supplier is the single most important factor influencing the B2B purchase decision. Delivering a customer experience that not only satisfies but also delights customers is therefore the safest way of ensuring repeat business. Organizations operating in B2B and B2C markets also need to ensure that their brand experience is consistent across both, as consumer experiences heavily influence B2B supplier choices.

Building an emotional brand connection. Creating a strong emotional brand connection is key for any B2B brand. In our survey, 95% of B2B decision makers stated that, even before contacting a supplier, feeling a sense of connection to a supplier's brand is as important as feeling confident about what they do.

Focusing on emotionally resonating content. One of the most effective ways of forming an emotional brand connection with the target audience is to publish engaging content. In our study 40% of the respondents said that they had shortlisted a provider because of their excellent content. Effective content should:

- Focus on stories that keep decision makers up at night and cover stories they can relate to.
- Position the supplier as a thought leader in their industry.

For content to resonate emotionally, it shouldn't just list product features and benefits. The best content strategies are those that cover a wide range of subjects that customers care about. Content research can help identify what those subjects are.

Head or heart?

How are B2B purchasing decisions made – with the head or with the heart? Clearly with both. In order to enter the consideration set, suppliers need to satisfy the rational requirements: offer a good product at a reasonable price and be reliable. However, in the end, successful suppliers are the ones that go one step beyond and convince decision makers on an emotional level by evoking trust, confidence, optimism and pride.

REFERENCES

1 B2B International, in association with B2B creative agency gyro, surveyed 2,000 decision makers across a variety of functions ranging from IT, marketing and HR to procurement and business management. The sample included small, mid-sized and large B2B and B2C businesses. Respondents were based in the U.S., China, Spain, the U.K., France and Germany. The research was carried out in 2019.

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QUIRK'S OUTLOOK 2020 AGILE RESEARCH

Toluna

Faster and smarter – the near future of the insights industry

Demand for near-real-time insights necessitates research that is agile, automated and fast

BY NICK LANGEVELD
Managing Director for North America, Toluna

Our clients are demanding increasingly faster and better insights and that is testing the industry to create the best technology platforms and to hire the best people to help bring those insights to life.

Even a few years ago, a negative event such as announcing a new driverless car feature at the same time as a fatal accident involving one of the company's existing autonomous vehicles would leave any auto company struggling to respond effectively to stakeholders. An almost complete blackout of insights in the first days of a crisis meant companies often made huge errors in tone and approach. They simply had no idea what their clients, partners and regulators – spread throughout the world – would want to know. Most could only issue a cookie-cutter press release explaining that they were working hard with officials to assess and remedy the situation.

Today, that just isn't enough.

Companies want to know what their various stakeholders are thinking and feeling. These insights give company leaders the ammunition to craft a response that keeps their supportive stakeholders onside and mollifies skeptics.

Clients increasingly demand near-real-time insights without geographic limits as well as the ability to interpret the insights and act on them quickly. We are moving rapidly towards a world where an auto company could figure out within an afternoon exactly what its stakeholders needed to hear. That information is worth millions in terms of reputation damage. It could allow the company to avoid customer boycotts, for instance, that could cost it millions.

Bringing insights to life

I'm thrilled to be on the front lines of the battle to deliver marketing research that is agile, automated and fast. Our goal is to bring insights to life – and do it faster and better than it has ever been done. Our clients – and all consumer industries – need a platform that delivers data that helps them make sound business decisions.

We no longer have the luxury of waiting for consultants to design and launch a survey to return to us in a few months' time with information we could act upon. We can now execute a global survey from design to analysis in two weeks rather than six months. Today, every hour counts.

We know the true value of insights that companies can use to improve their products, their branding and

the lives of their customers. We helped consumer goods giant Kraft design its first corporate brand campaign in a way that would resonate with both parents and children. The outcome of the research was that Kraft was able to overcome the unease parents felt using easy boxed meals like Kraft macaroni and cheese because it also learned that children would rather have the extra time to spend hanging out with their parents rather than having meals cooked from scratch.

The analytical ability of our teams and of our client teams is paramount. To get usable insights we must start with good survey design on the front end. And this demand is taking place with the backdrop of increasingly sophisticated options. No longer are we limited to simple surveys. We can include such useful features as text highlighters that enable packaging, advertising and marketing copy to be evaluated by respondents who indicate the words or phrases that are liked, disliked or deemed confusing. We can also design features such as surveys that are logical so that survey respondents are only asked applicable questions or timed exposure that shows advertisements or package images at intervals ranging from 1-30 seconds before asking recall questions. To even develop these kinds of innovative features, you have to have people who ask themselves, "How far can we stretch the technology in ways that help us deliver the right insights to our clients?"

A great technology platform based on best-practice techniques places power in the hands of users so that they can turn it into information that helps them craft the best campaign, create the best packaging or scrap plans that could have been disastrous for the company. By employing Kaizen, the Japanese word for continuous improvement, both the platform and the people can learn from previous applications and become smarter and better able to handle even more complex tasks.

Financial advantage

As innovative as our sector is, we aren't really the driving force behind this seismic shift. Our clients are demanding the speed and agility and we are all competing hard to be the one that can deliver it. It doesn't take a rocket scientist to see why. There are two key drivers. A previous six-month project could have cost in the neighborhood of $400,000. Today's equivalent, completed from idea to actionable insights, would cost 10% to 15% of that. The second driver is profit. Delivering the right message or the right product to the right market packaged the right way means the difference between success or failure.

Another key driver is being able to understand every market you compete in. In the past, even the largest companies didn't have the luxury of time to test concepts in every single market. As it turns out, insights can vary wildly between regions. Sometimes there are almost contradictory results. For instance, a consumer goods company tested images for global skin softening product. We tested an image of a man touching a woman's arm. For most of the world, the image evoked exactly what was intended – the idea of soft, touchable skin. In the Middle East however, the reaction was extremely negative. It was perceived as threatening and as a violation. Cultural differences are critical and increasingly, it seems, harder and harder to analyze based on narrow sample sets. The ability to test across multiple regions quickly and effectively prevented a social media backlash – not to mention a failed product.

Every human living in a connected society has come to expect instantaneous answers to any question life poses. Just as we used to have to go to a library to check out a book to find an answer that today we can Google in less than one minute (or ask Siri), this same demand for instant – and smart – information is shaping our industry. It's pushing us beyond our comfort zone.

The future looks bright

Having worked on the consultative side of our sector and the pure SaaS self-service side, I know that the next step will be giving customers what they demand – the convergence of these two models.

We already have super-smart people working in marketing research. But we need to do a better job of developing the skills necessary to work in the research industry of the future. It will require people with two sets of skills or aptitudes that don't always come together – technology savvy and industry understanding. At Toluna we make a point of recruiting people who have a curiosity and understanding for technology and who are skilled in insights – often with a deep understanding of consumer goods sectors.

And for those young people looking to lead the next generation of marketing research, I would advise studying computer science and then finding an industry – one that you are passionate about based on the things that are important to you – and learn the ropes. If you love fast cars, or sports, or music, then join one of those industries and learn everything you possibly can. Your passion combined with your technical skills will propel you to the top.

www.tolunacorporate.com

QUIRK'S OUTLOOK 2020 MACHINE LEARNING

APPLIED MARKETING SCIENCE

How the landscape of market research is changing

Faster, better insights with AI

BY CARMEL DIBNER
Principal, Applied Marketing Science

Machine learning is an increasingly prevalent term in today's market research landscape. But what is it and why is it so important?

The ultimate measure of successful research in a mature and well-understood category hinges on its ability to uncover new, game-changing insights. Traditional market research can be expensive and time-consuming and in today's hypercompetitive digital landscape it can be harder than ever to find truly new, actionable insights. Now more than ever product developers expect to quickly and easily discover new insights on smaller budgets and within shorter time frames. But how can researchers maximize the chances of uncovering new, breakthrough insights within those constraints? The impactful insights that product managers and marketers are looking for can now be discovered without collecting primary research data. Machine learning and AI, when coupled with professional analysts, expedites the discovery of customer needs from user-generated content (UGC) and identifies "needle-in-the-haystack" insights that are either infrequently mentioned or overlooked completely in more traditional qualitative research.

Mining user-generated content

Machine-learning algorithms can utilize a variety of content types so it's critical to identify the best sources of user-generated content for your project. In some cases, useful content exists on product review sites, social media pages, customer forums or in blog posts. In others, it exists in call center data, transcripts of customer interviews from prior studies or answers to open-ended survey questions. Regardless of the source, customers are discussing your brand and sharing their opinions and stories. These data are a goldmine for machine-learning analyses.

The benefits of machine learning

While the sheer amount of customer data may seem overwhelming, the good news is the machine is able to do the heavy lifting. Key advantages of the machine-learning method include:

Faster: AI is faster than traditional research because of the machine's high processing power. The machine can process hundreds of thousands of records of data in a matter of minutes.

Better: Machine-based analysis is able to overcome human research bias. The machine has no hidden agenda and does not heed to corporate politics. Unlike humans, it does not enter with precon-ceived bias and is completely objective in what it finds.

Cheaper: UGC is virtually free, with the only nominal cost being the data-scraping tools used during the process. AI cuts out the costs used in traditional market research, such as recruiting fees and incentive fees.

Complete: Machine learning rapidly scans hundreds of thousands of data, ensuring all insights gathered are accurate and complete. Traditional research can be limited in collecting respondent data based on time, sample size, feasibility and cost.

Easier: The machine streamlines the process of data reduction, pulling signifi - cant insights from massive data sets.

Relevant: Customers often post about their experiences right after key moments of truth. These polarized experiences are what frequently give you informative insights.

Developing the machine-learning algorithm

In collaboration with researchers at MIT, AMS developed a proprietary AI methodology called ACE™ (Automated Content Evaluator). This tool uses convolutional

FASTER, BETTER INSIGHTS WITH AI

MACHINE LEARNING MAKES IT POSSIBLE TO MORE QUICKLY FIND THE INSIGHTS THAT MATTER

neural networks – a type of supervised machine learning – to dramatically reduce the time and effort required to gather a comprehensive set of customer insights in a category. While many tools summarize key themes and keywords mentioned in big data, ACE™ dives deeper and identifies pearls of insight that traditional market research methods like focus groups and interviews might overlook.

Working with researchers at MIT, the effectiveness of the tool was proven by comparing the machine's results with the results of traditional research studies. For example, in the oral care category, the tool uncovered nearly every unique customer need that was identified with traditional research. Furthermore, machine learning can identify insights that are unlikely to appear in a random sample of user-generated content of equal size. The machine unearths critical insights that are unlikely to surface through random sampling. Time and again the technique has proven itself. In cases where the data already exists, ACETM consistently gathers fascinating insights for innovation, faster and cheaper than traditional market research methods.

Successful applications of machine learning

Machine learning has been used by both B2B and B2C companies to gather a complete database of customer insights in only a few weeks. Successful machine-learning research projects have been completed in a myriad of categories, including small kitchen appliances, skin and haircare products, prepared foods, oral care products, drug-device combination products and even snowplows. Even those in mature categories have discovered new insights that were not highlighted in prior research.

Further, machine-learning algorithms allow firms to examine product and service adjacencies in-depth. Multiple adjacencies can be explored in a single research study, contributing to the machine's agility, speed and efficiency.

Additional helpful analyses

- The ability to use quotations to understand the relatability of the needs
- Sentiment analysis

There are many additional benefits that are evolving from the use of AI in analyzing customer experiences. One benefit to this method is that each customer need can be traced directly back to a verbatim, or quotation, detailing a customer's experience. These rich verbatims can then be used as input to a quantitative survey where customers are asked to rate the importance and relatability of those verbatims. Negative verbatims that customers find relatable, for example, can often be areas ripe for product innovation. Using these illustrative quotes when presenting key research findings can also help clarify your findings and engage key stakeholders. Additionally, incorporating sentiment analysis can add further depth and richness to those customer experience profiles.

What's next?

It's no secret that the constantly evolving field of AI is changing the way market research is conducted and used worldwide. Innovative companies across the globe are embracing AI and discovering the many benefits the technique offers. In rapidly changing industries, machine learning experts would suggest leveraging available tools every three to six months. In industries with a slower pace of change, keeping a pulse on user-generated content every few years may be sufficient. Either way, experts agree that machine-learning methods are worth considering for nearly all product and service categories. Revolutionize your market research efforts with machine learning and start uncovering new pearls of insight today.

QUIRK'S OUTLOOK 2020

CUSTOMER SATISFACTION/
EXPERIENCE RESEARCH

FocusVision
See for yourself

Delivering in the experience economy: CX in 2020

Incorporating insights into CX is no longer a nice-to-have

BY ZOE DOWLING
SVP Research, FocusVision

Customer experience matters. People are inundated with choices for every product and service that they use and they are making decisions differently than in years gone by. Today, customer experience (CX) is a deciding factor. Expectations are high and CX effectiveness easily makes or breaks the purchase decision.

Like any chain, CX is only as strong as the weakest link. With experience covering every single interaction that your customer has with your brand – from advertising messages, website visits and content consumed to purchase transactions and customer service exchanges – there is a lot to be considered.

It shouldn't come as a surprise that customer insights are crucial to a business' success and that there are massive benefits to taking a data-driven approach. Delivering high-quality, relevant customer experiences that resonate on an emotional and rational level leads to increased customer satisfaction or retention, new innovations and increased sales.

Drowning in data

Despite the positive impact insights can provide, recent predictions from Forrester suggest that most companies are still struggling to put useful insights programs into place.

Gathering data is all about understanding what your customers want – how they think and feel – so you can predict how they will act.

While big data has fallen from the peak of inflated expectations into the trough of disillusionment (Gartner actually removed big data altogether from its Hype Cycle in 2015), its allure remains. Martin Lindstrom, founder and chairman of Lindstrom Company and author of "Small Data: The Tiny Clues that Uncover Huge Trends," notes in a recent Harvard Business Review Analytical Services (HBRAS) study, sponsored by FocusVision, "The biggest problem with corporate data today is that everyone is so obsessed with getting big data solutions on board."

Emotions matter, though. Lindstrom goes on to say, "You have to get your hands dirty to see the world from the customer's point of view. You have to put yourself in their shoes and feel what they feel. Then you have something valuable."

CX strategy falling short

Companies have spent years building databases, data sources and data-driven strategies. However, they still struggle with effectively operationalizing data to understand customers and predict business outcomes. The same HBRAS study found that a mere 20% of companies believe their customer experience strategy to be very effective.

Clearly an ineffective CX strategy does not create a sustainable business.

To win in the experience economy, at minimum you need to deliver relevant experiences to your customers. The way to do this is to build programs based on a holistic understanding of them.

As we enter 2020, a shift will occur as companies turn inward to address these challenges and ultimately serve their customers better. There are three key areas where this will take place:

- **Not an either-or: Integrating big and small data.** We know that big data – CRM, web analytics, social media interactions, POS and many others – provides crucial information on what customers are doing and the actions they are taking. It helps create digital engagement strategies and provides indications on performance. This data tells you what people are reacting to but not why (or why not).
  Digging into the "why" is crucial. Recent research from Forrester, commissioned by FocusVision, uncovered that how a person feels about a brand has a 1.5 times greater impact than how they think on driving sales, brand loyalty and advocacy when compared with other factors. Further, brands can leverage this data to predict business outcomes.
  We can see that both types of data have their intrinsic value; however, this value is compounded when they are integrated, delivering a holistic picture of the customer, their journey and their feelings.
  Companies are recognizing that combining these two types of data helps brands unlock customer understanding and open the door to business opportunities.
- **Multi-layered investments: Systems, processes and skills.** Companies have technology problems. They use multiple technologies from multiple vendors, resulting in a technology stack where each does one thing. This means data comes in from numerous sources, in different formats and streams into various departments.
  Most of these technologies are unconnected, with limited ways to view the data in a single place, making it extremely difficult to derive what decisions should be based upon.
  The challenges for companies will be to figure out how to successfully integrate all these data sources. This will mean looking at all areas, from systems and processes to skill sets and training.
- **Building internal relationships: AKA reducing silos.** Another hindrance to successful customer insights is a lack of collaboration across departments. Only 54% of marketers report that customer insights and marketing regularly communicate with one another. While research departments are equipped to gather, analyze and translate customer data, marketers must also be able to understand and leverage this data to inform and execute successful strategies.
  For researchers, sharing data in digestible formats that enable self-service insights is critical so that others in the organization can more efficiently leverage insights. Of course, some of this will need to be enabled by the investments in systems, processes and skills.
  Even in the current climate, however, research professionals are well-poised to become strategic business partners amidst the transition to CX-centric marketing. We are already the conduit between the customer and the business. But with the reduction of silos, this role becomes ever-more important and impactful.

The bottom line?

2020 could potentially be a trying year for brands but those with strong CX strategies will rise to the top. Shifting customer behaviors and market forces portend difficult times for brands ahead of a looming recession and ever-increasing customer expectations. Knowing this, smart brands will bite the bullet, turn their attention inward and address the roadblocks to building successful CX strategies and implementations. This is far from an easy road ahead but the benefits could mean survival.

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QUIRK'S OUTLOOK 2020 AUTOMATED RESEARCH

Confirmit

Automated research: an opportunity, not a threat

AI enables research roles to evolve, creating more accurate, agile research

BY WALE OMIYALE
SVP Market Research, Confirmit

Automation in our industry is nothing new. For years, research organizations have been under pressure to uncover deeper, better, more actionable insight faster and more cheaply. Why then do we continue to see debate raging about automation's place in our people-based sector? From warnings that artificial intelligence (AI) signals the death of market research to the promise of a complete rebirth, it's hard to know where reality lies.

The truth is there's no panic. We're an industry that's been doing this for years. Back in the day, questionnaire scanning was revolutionary in speeding up the data capture process – created in direct response to the need for faster results. A simple example but one that shows why automation is essential to the continual evolution of our sector.

The biggest difference is that automation now spans the entire market research lifecycle – from survey design to sampling, data collection to reporting and analysis to insight. And today's tools work on a much deeper level, using more advanced techniques, from emotional response recognition, to multimedia feedback, to social media analysis and more.

While the tools we now have at our disposal are designed to make the lives of both researchers and clients easier, some argue that they do the opposite – and that the relentless pursuit of speed compromises research quality too.

But is this really the case?

The quality vs. speed debate

Software providers are working hard to hone the capabilities of automation tools to ensure that research can be both fast and high-quality. In an effort to balance the demands from market research agencies for accuracy and quality with the needs of end clients for instant business insight, automation has paved the way for accurate, agile research.

But this minefield of technology choices can pose real challenges for data integrity. Many also still question the accuracy of software-interpreted data. These are valid concerns but they're being put to rest as automation matures. Today, there's a wealth of solutions that deliver proven data accuracy, consistency and faster insight delivery.

Take text analytics, for example. The increasing volume of social media data has been a key driver for developing automated analysis tools and social media analytics solutions are now proving their value in delivering insight from vast data sets.

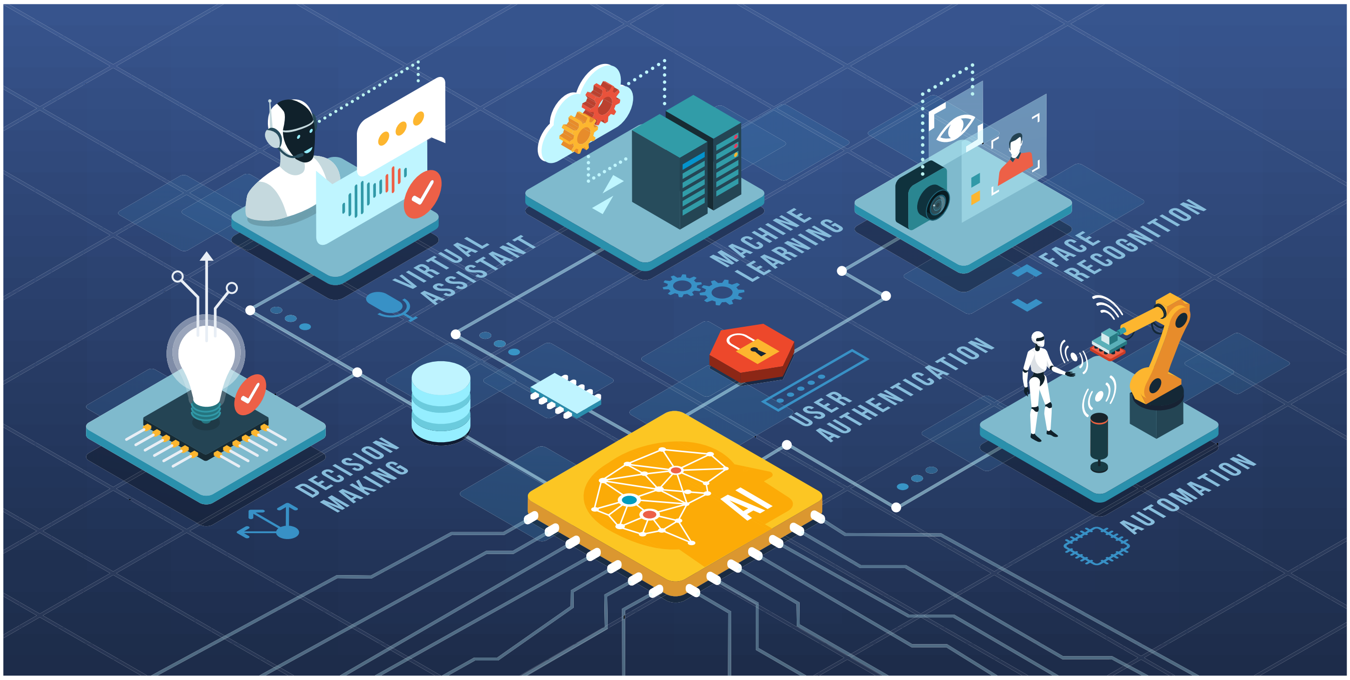
Such tools have the added advantage of allowing researchers to become insight experts. Automating repetitive data collection and analysis tasks enables researchers to focus on the in-depth analytical processes that continue to require human interpretation.

Combining human skill and automated action

What's increased in the past few years is the level of capability that automation can now deliver – moving from simple, process-based work to deeper, more complex and cognitive aspects of the research lifecycle. This is where some commentators raise the threat of human redundancy.

This isn't without foundation. Predictive analytics, automated creation of surveys from Word documents and action modeling are just a few examples of the step change that we're seeing. These types of solutions are slowly creating a new normal for market research practitioners.

But with administrative tasks being capably handled by automation tools, research teams are now embrac-



ing the opportunity to evolve themselves. We're seeing the formation of specialist hubs, where researchers become data scientists and reports become strategic business guidance. Indeed, the increased need for skilled people is one of the key benefits of automation – and we're already seeing that research roles are evolving to fit new ways of working.

Automation is increasing the requirement for broadly-skilled project managers, for example, where in-depth subject knowledge is no longer required but an understanding of the many automated steps of the research process is critical. There's also growing evidence to suggest that automation improves inter-departmental working and collaboration, both across survey teams and with external partners and customers.

Increasingly clever, increasingly skilled

Today, we're seeing an acceleration in the introduction of market research-specific automation from a new angle – artificial intelligence.

AI solutions delve even deeper into the research process, with the latest techniques such as deep-learning neural networks and natural language processing being harnessed to automatically uncover insights.

This is driving exponential growth in the implementation of AI tools across all aspects of market research, most notably in the areas of predictive analytics, social media analytics and action management.

By moving beyond a model of analyzing research data based on predefined category models, organizations can continually learn with an "automated eye" on what's changing in their world. Tests show that even in their early adoption, such tools deliver accuracy results that often exceed 90% and outperform human analytical capabilities.

Embrace it – automation is here to stay

This is, perhaps, a scary scenario for all of us who work in market research. Looking at accuracy rates and the raw capabilities of AI tools alone, it's easy to assume that we don't need people to deliver better, deeper insight to our clients.

But technology is an enabler – an opportunity for human roles to evolve. Embracing tools to do some of our deeper learning means that we're able to elevate our own work to deliver better, more accurate guidance and decision-making.

Automation, and particularly AI, is a catalyst for human understanding, not a replacement for it. It doesn't deliver all the answers fully-formed but provides the most accurate and appropriate insight to guide people to the answers we need.

Along with the wealth of wider benefits that automation delivers to clients and researchers alike – increased opportunities for self-serve; the creation of "lighter and faster" research to sit on top of in-depth programs; accessibility to research for wider teams; repeatability; and productivity and cost savings, to name just a few – we need to embrace automation for everything it delivers.

There is just one proviso – and it's a big one: We must be more rigorous than ever in our assessment of quality. This requires a finely-tuned understanding of how data needs to be accessed, manipulated and delivered. By sticking to our foundations of integrity and accuracy, automated research is one of the biggest tools in our armory – and our best opportunity for market research evolution in the face of ever-changing client requirements.

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QUIRK'S OUTLOOK 2020

SMS/TEXT SURVEYS

PRECISION OPINION

SMS is the future. Are you ready for it?

Tackling data quality in SMS surveys

BY ALEX MEDICK
Entrepreneur & Chief Marketing Officer,
Precision Opinion

For the past year, Precision Opinion has been diving into the world of SMS/text messaging to understand how it can be used as an additional method of data collection. We knew from the start that mobile devices were the optimal choice to connect and engage with respondents, but we were in search of how to legally reach non-opt-in individuals in all areas of the United States to conduct market research surveys through SMS without sacrificing quality and results. In addition to maintaining quality, we also wanted to look at the integration of big data and user experience behavior to grab the most well-rounded insights while asking the fewest questions possible to keep the survey short and concise. After months of research, testing, legal consultations and developing technology that adheres to and exceeds the standards of compliance for the market research industry, we are ready to reveal to the world our latest product, Gather. What does Gather mean for market research? Let's dive in!

Text messaging statistics for the modern age

The majority of Americans prefer to communicate via text message – a 2019 study from TextMagic.com found that texting is the No. 1 method of communication for Americans aged 50 and below, with 97% of Americans texting at least once per day. Additionally, 82% of text messages are read within five minutes of being received, compared to the 1 in 4 e-mails that are actually opened by a recipient. "Consumers prefer to open texts on their mobiles rather than receive e-mails or calls," Text Magic reports. "This may indicate that texting is viewed as a more trustworthy channel than e-mail or phone calls, which are more likely to be affected by robocalls or spam. Also, consumers prefer texting to e-mail when it comes to getting time-sensitive notifications."

That being said, it's clear that using text messages in order to capture insights from a more well-rounded group of individuals is imperative. It's a direction that our industry must take in order to prevent skewed data from the few that still answer phone calls on their mobile device or the quickly fading landlines (roughly 10% of the U.S. population still has a working landline; phys.org, 03/2019). Additionally, while phones are still a viable way to capture respondents, e-mail is becoming increasingly difficult due to the amount of spam messaging and bad actors that interrupt inboxes. So, what does one do? That brings us to our software, Gather – an SMS market research tool.

Landline / Cell / SMS Comparisons							
Method	Completed Interviews	Sample Records Used	Sample Used Per Complete	Hours in Field	Completes Per Hour	Total Project Cost	CPI
Landline	301	50,271	167	122.89	2.45	$2,949.36	$9.80
Cell	108	15,467	143	197.79	0.55	$4,746.96	$43.95
SMS	578	62,921	109	5.00	115.60	$5,233.68	$9.05

Margin of Error +/- % at a 95% Confidence Interval		5.65	9.43	4.85	4.08	LL+CELL vs SMS
		Landline	Cell	LL+Cell	SMS	DELTA
Race	White	76%	56%	66%	74%	8%
	Black	7%	20%	14%	6%	-8%
	Hispanic	4%	12%	8%	5%	-3%
Gender	Male	47%	64%	56%	53%	-2%
	Female	53%	36%	45%	47%	3%
Education	High School	26%	14%	20%	9%	-11%
	Some College	18%	19%	19%	21%	3%
	College Grad	20%	35%	28%	29%	2%
	Advanced Degree	12%	17%	15%	20%	6%
Age	Under 24	3%	11%	7%	4%	-3%
	25-34	4%	29%	17%	12%	-5%
	35-44	10%	36%	23%	18%	-5%
	45-54	21%	16%	19%	19%	1%
	55-64	14%	3%	9%	10%	2%
	65-75	32%	6%	19%	28%	9%
	75 Over	17%	0%	9%	8%	-1%

Comparisons

Margin of Error +/- % at a 95% Confidence Interval		5.65	9.43	4.85	4.08	LL+CELL vs SMS
		Landline	Cell	LL+Cell	SMS	DELTA
Registered to Vote	Yes	95%	94%	95%	95%	0%
Political View	Liberal	19%	29%	24%	32%	8%
	Moderate	31%	35%	33%	29%	-4%
	Conservative	43%	31%	37%	34%	-3%
Party Affiliation	Republican	24%	15%	20%	20%	1%
	Democrat	25%	22%	24%	22%	-2%
	Independent	50%	59%	55%	56%	2%
	Green	1%	4%	3%	2%	-1%
Very Likely to Vote		87%	84%	86%	93%	8%

SMS in market research

Gather is a 100% TCPA-compliant SMS market research software that allows surveys to be sent to non-opted-in respondents across the United States. To validate the efficiency of and need for our software, we put it to the test by running a parallel study of SMS vs. cellphone and landline dialing to see if the quality and results kept in line with the standards we expected.

A comparison of landline/cellphone/SMS deliverables

Precision Opinion ran an independent comparison survey to better understand the difference in time in field, cost to collect and demographics of respondents between landline, cellular and SMS methods of data collection. The survey instrument was designed to be 12 minutes long and contained a variety of current news and events questions. A national RDD sample was pulled from voter files and population quotas were based on the U.S. Census. Data collection took place over a consecutive four-day period of Thursday through Sunday.

At the end of the data collection period, 301 surveys were completed by landline (+/- 5.65% at a 95% confidence interval); 108 surveys were completed by cellphone (+/- 9.43% at a 95% confidence interval); and 578 surveys were completed by SMS (+/- 4.08% at a 95% confidence interval). In total 987 surveys were completed (+/- 3.12% at a 95% confidence interval).

Key discovery

Understanding price and time in field are key components in the delivery of unbiased balanced data, and as a result of conducting an analysis of our 12-month in-field study of SMS protocol it is our opinion that adding the verified Precision Opinion TCPA-compliant SMS methodology to landline calling gains the best of both worlds of predictive data and cost efficiency. The cost of cellphone dialing in this comparative document is 4.85 times more expensive and takes 39.5 times more hours in the field than does SMS. The other key discovery is Precision Opinion's Gather software can stand on its own and has produced unimpeachable findings in media testing, ad testing, tracking, messaging, issue/crisis management, likely donor score and more.

Productivity comparison

SMS delivered the shortest field time by a wide margin. It took only five hours of production time to produce 578 completed interviews – a rate of 115.6 completes per hour. Cellphone took 197.79 hours in the field at a rate of .55 completes per hour while landline predictive dialer production was at a rate of 2.45 completes per hour.

Using an example rate across the board of $24 per hour, the cost per completed interview would be $43.95 for cell, $9.80 for landline and $9.05 for SMS.

Demographic Comparison

Overall the percentage delta of core demographic measurements was steady across most all subsets. The only category that fell outside the margin of error yet is weighable was an 11% delta in the high school education box with SMS producing 9% of the respondents versus 20% for landline and cell respondents.

Political Comparison

Allowing the sample to fall out naturally with no quotas or weighting, we found each comparative category to be balanced. In landline/cell versus SMS, the only segment outside the margin of error was "Liberal," receiving an 8% higher representation from the SMS data collection versus landline and cell.

While we initially dove into the world of SMS as a way to find new data collection methodologies that could replace online and expensive mobile phone calls, we discovered something far greater – a holistic approach that utilizes phone and SMS to better capture insights than ever before. Additionally, with public policy research in particular, Gather is able append SMS data to registered voter files to discover more insights into an individual's actual voting patterns.

With the use of SMS, telephone, online and in-person research methodologies, Precision Opinion is now able to establish well-rounded consumer behavior strategies that allow for insights like never before.

QUIRK'S OUTLOOK 2020

SAMPLING

innovate MR
Faster Answers™

Sample quality isn't expensive, it's priceless!

Five questions to ask your sample provider

BY LISA WILDING-BROWN
Chief Research Officer, InnovateMR

Cyberfraud is at an all-time high, impacting billion-dollar global brands, social media giants, government institutions and small businesses alike. Recently, Forbes cited research which predicts that cybercrime will have cost $6 trillion globally by 2021. Like a computer virus, fraudulent activity is evolving and new strains are surfacing every day. Unfortunately, given the incentive-driven environment of the survey world, our industry is not impervious to these threats and sample companies in particular face intense pressure to eradicate poor quality from the equation. There is no silver bullet or quick-hit therapy to save us from the various hazards that threaten sample quality and data integrity – what's a researcher to do?

To combat these bad actors, researchers should focus on layering in various proactive mechanisms to counter online malicious behaviors, overzealous professional respondents and natural duplication resulting from multi-vendor reliance. Leveraging both technological and methodological strategies are vital elements to a winning formula; this philosophy rings true for both consumer and B2B research. While the onus of data integrity cannot solely rest on the shoulders of sample providers, as a researcher there are critical questions that you should ask of your sample partners. Doing so will position you and your study for success and mitigate the various quality risks lurking at every turn. To ensure sample quality, here are five questions to ask your sample provider:

1. How is your audience vetted and recruited and what specific sources are used for recruitment?

Control is the name of the game! In a sea of sample aggregators and brokers, the plain truth of the matter is that companies which manage their own proprietary asset have more control and quality oversight on the participant experience as well as visibility to where respondents are coming from and how they are performing. All sources are not created equal and they can have a massive impact on your data quality. Understand the origin of each source and what steps your sample provider is taking to monitor performance.

2. What information is collected among your audience?

The more a sample provider knows of a respondent and their history, the greater predictive power the firm has in forecasting future behaviors. As it relates to consumer sample, ask to see a list of the various demographics (as well as psychographics) and general profiling questions collected against the sample asset. Ask to see the B2B-oriented questions used to profile panelists (firmographics). Is this screening done at registration, throughout a panelist's lifetime or via a pre-screener (on-the-fly, prior to survey entry)? Thorough vetting should be conducted at registration and throughout a panelist's tenure. Waiting to screen respondents until the last minute before being delivered to your survey is a recipe for disaster and will result in false positives. Ask to see the specific questions used to ensure these are not leading in nature and if there are mechanisms in place to terminate over-endorsers. B2B-specific red-herring questions are a great way to test authenticity and true business expertise. Lastly, ask your sample provider if

the firm is Microsoft Certified. Microsoft certification is the gold standard for B2B sampling and the level of rigor required is second-to-none. Working with a certified vendor will help mitigate risk and position you for success.

3. How is your audience incentivized?
Gain an understanding of how participants are motivated. What is the average incentive offered? How are incentives provided and at what frequency? Are participants rewarded when they don't qualify? Essentially, these questions can help you understand if there are conditioning behaviors being generated to help maximize margin on the sample sale. To offset learning effects, panelists should be rewarded properly and consistently and terminating experiences should be managed suitably to avoid dishonesty and attrition.

4. What is the frequency of contact for your audience? How is your sample frame balanced?
Gain an understanding of how often panelists are participating. Does this frequency seem reasonable or over-enthusiastic in nature? As a business professional yourself, call into question the likelihood of someone participating more than one or two times a week. A high survey cadence can produce respondent fatigue as well as engender overzealous behaviors (e.g., the notorious "top-two boxers"). Similar thinking should be applied for consumer sample as well. If a respondent is participating in multiple surveys per day, the proclivity for one to provide thoughtful and meaningful responses decreases significantly. Understand how your partner generates and balances the sample frame used for your study. Aside from demographics – or in the case of B2B, firmographics – what other variables are used to control for sample noise and volatility? A "quality-first" sample firm will use attitudinal and behavioral measures to create stability and replicability. Leveraging outside data sources such as the General Social Survey or the Pew Research Center can be effective strategies for blending the sample and controlling for the variability that is often present in sample sourcing.

5. What mechanisms are in place to mitigate poor quality?
Your provider should have several layers in place to prevent a wide spectrum of negative behaviors such as blatant cyberfraud (i.e., scripted bots, click farms and hackers) as well as other undesirable behaviors (i.e., dishonesty, lack of expertise and over-endorsement). Just this past year, I've spent countless hours demonstrating InnovateMR's newest quality tool, Text Analyzer™. Our team is thrilled to bring this cutting-edge quality product to the market research industry. In a world of quantitative analyses, it can be difficult and time-consuming to assess the quality of open-end responses. The Text Analyzer™ uses advanced data science and algorithmic techniques to evaluate respondent answers in real time. The tool checks for gibberish, profanity, duplication, copy/pasting and bot-activity as well as context. Available in several languages, this technology evaluates the contextual relevance of the respondent answer as it relates to the specific question presented. InnovateMR's clients are saving hours of time manually reviewing open-end responses and instead providing an invaluable qualitative assessment for their various stakeholders and constituents. This tool is just one of dozens our team has developed to increase quality. Implore your sample provider to demonstrate these quality layers. The more detail, the better! If you come away from the conversation feeling unimpressed or lacking specifics, it is time to move on.

Research done right

Sourcing high-quality sample can be an arduous road with many pitfalls and threats along the way. If you are finding exceptionally cheap and cheerful sources of sample, it is probably too good to be true. Do not be afraid to ask the tough questions. Get specific, be relentless and leave your naiveté at the door. Recruiting real B2B professionals is an investment and as such, sourcing this audience for your survey requires an investment on your end too. As I have said before, buying high-quality participants is not expensive, it is simply priceless!

Are you interested in learning more about InnovateMR's recruitment and panel management expertise? Check out our resource library at bit.ly/36NBZ6b. Or better yet, e-mail us today to schedule a discussion with InnovateMR's chief research officer and resident data quality expert, Lisa Wilding-Brown at lisa@innovatemr.com.

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QUIRK'S OUTLOOK 2020

DYNAMIC IN-PERSON RESEARCH

insightfarm

Dynamic in-person research clears the path to insight

Really big ideas come from real people

KELLEY STYRING
Principal, InsightFarm

Focus groups are so yesterday. And yet it's clear that embracing the human element behind the numbers and striving for "why" has never been more important. We have so much information from digital sources that it can be overwhelming. It's a bit like being surrounded by fog – it appears that we can head in any direction but we don't know which ones may actually lead us to the next big idea. Most of the time big insight doesn't come from a collision of numbers but from digging into real stories with real people.

Here are four dynamic in-person research methods that InsightFarm uses to help clients cut through the fog and discover the elusive insights that clear our path to big inspiration.

1. Flexible group structures

Interactions between people are fascinating and provide a fertile environment for learning. Why do you think talk shows are so popular? You'd think it would be as easy as getting a group of people together, galvanizing them with a topic and watching them go. But there are certain structures that work better than others. In fact, organizing with fewer people for shorter periods of time actually yields much stronger outcomes than traditional discussion group structures. And shifting the group dynamic during the experience can take things to a whole new level.

Success story: During a recent in-person research project, four consumers were interviewed together, then broken into pairs to build a storyboard. After sharing their work in a show-and-tell format, they were asked to write individual reflections on what was learned. This provided a degree of depth and breadth not achievable in a simple group discussion.

2. Behavior-inspired exercises

Talking to people can be intensely interesting. But learning what people like by asking them directly is pretty ineffective. Respondents want to please the moderator to get paid. And they want to be invited back, so they may hold back on valuable critique. Tapping into their natural behaviors to sort the wheat from the chaff is a better way to go.

Success story: Recently, we helped a brand build better concepts from a set of alternatives they had created prior to the research. Instead of asking which ideas respondents liked, we read each idea aloud and then gave them time to place each idea in a line from "most interesting" to "least interesting." Then we probed the extremes – identifying key words, logic or logic gaps and connections to needs that

motivated them to physically place a description on the least-most spectrum. This activity quickly revealed strengths and weaknesses in the ideas presented. With a few simple adjustments, those ideas with the most potential turned into some real hunters.

3. Competitive generative work

Unfortunately, there's often a bias that respondents are not creative. We put them on the spot in an interview and when they can't come up with a scintillating solution to our most pressing problem, we discount their

abilities. Often the problem is that we haven't given them an inspiring assignment or fuel to build great output. Sometimes setting respondents up for success is all we need to do to get dynamic results.

Success story: One generative tool that helps respondents visualize how they think about a complex topic is "mind mapping." By listing the major nodes and descriptive details in a diagram a lot of ground can be covered in a short period of time. Simply tasking consumers with drawing a map during an interview leads to boring, underwhelming results. They do the bare minimum and under these conditions, we get what we deserve. For a beverage client, we took a group of four people and broke them up into two-person teams. These "dyads" each drew a map of a specific beverage category (products, behaviors, containers, occasions, etc.) and competed for extra cash based on which team's output was the most thorough. The energy level, creativity and completeness skyrocketed. Clients served as judges to decide who won in a Shark Tank kind of competition. Clients asked questions directly to the teams and the entire format increased engagement by "breaking the glass."

4. Real-time learning labs

There's no substitute for watching people use products in their natural environment. It is the ideal context to learn and inspire even better product experiences but it's not very practical. It requires an enormous amount time, energy and expense to go into a consumer's home and wait for the magical moment when they use your product. Sometimes, it makes sense to build a lab where you can observe that specific moment across many respondents and learn in a much more efficient way.

Success story: A few years ago, we were helping a client who makes sippy cups better understand the human factors of closure. This particular cup gave consumers a tactile and audible click when the cup was properly closed. But in the marketplace, many cups leaked, leading to a hypothesis that the closure didn't work. We could have gone into homes and observed many hours of random child-rearing, waiting for that sippy-cup-filling moment. We could have asked consumers to upload a video of that moment when the sippy cup was filled but the cue was too subtle to hear on video and the reaction on mom's face was very important to knowing she heard and felt the signal. So, we set up a lab where 20 moms were able to interact with the product six times each in a single day. That's n=120 interactions. We were able to observe each mom's interactions, record reactions and perceptions and even apply a torque meter to the cup to see how tightly she had closed it. Without that in-person dynamic learning lab we might never have experienced the huge "aha" moment that made all the difference.

Consumers desperately want to show us their ideas. Brands desperately need to find the right direction more quickly. And dynamic in-person research is the best way to clear away the fog and lead you to deep, rich, meaningful insights.

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QUIRK'S OUTLOOK 2020

BEHAVIORAL ECONOMICS

emotional logic

The emotional approach

Why behavioral economics is better value for money than traditional market research

BY ANNETT PECHER
Founder, Emotional Logic

According to the most recent Gartner CMO spend survey, marketing budgets in U.S. and U.K. companies are mostly steady or declining. This means that each dollar or pound spent in 2020 has to deliver higher ROI than last year. One way in which businesses can achieve this is by applying a behavioral economics approach to market research.

A study by Emotional Logic has shown that using a behavioral economics approach enables marketing teams to achieve higher sales impact with the same budgets. This is just one of the reasons why behavioral economics is a key growth sector within market research and is forecast to continue to increase significantly in 2020. Behavioral economics applies to brand development, packaging testing, digital user experience, segmentation, communication development, in-store shopper studies and customer satisfaction and can increase efficiencies in all areas of your marketing activity.

Behavioral economics helps you find the meaning behind the data

Digitization has rapidly increased businesses' ability to collect data. The challenge we all face is how to turn this deluge of data into actionable insights that will help marketing departments deliver commercial success.

Success in marketing is inevitably linked to changing behavior – we want people to consume more (or less) of something, switch to a new brand or change the way they think about a subject. But we can only change behavior if we know what is motivating it. Many businesses fail to truly understand the motivations of their customers and that is why they have such a hard time influencing their behavior.

Big data alone will not deliver the answer. While it provides powerful information on what consumers are doing and when and where they're doing it, it struggles to explain why. Adjacently, traditional market research that simply asks consumers why they do what they do will also inevitably get the wrong answer because consumers don't always know.

Behavioral economics-based market research gets closer to real consumer behavior than any other approach

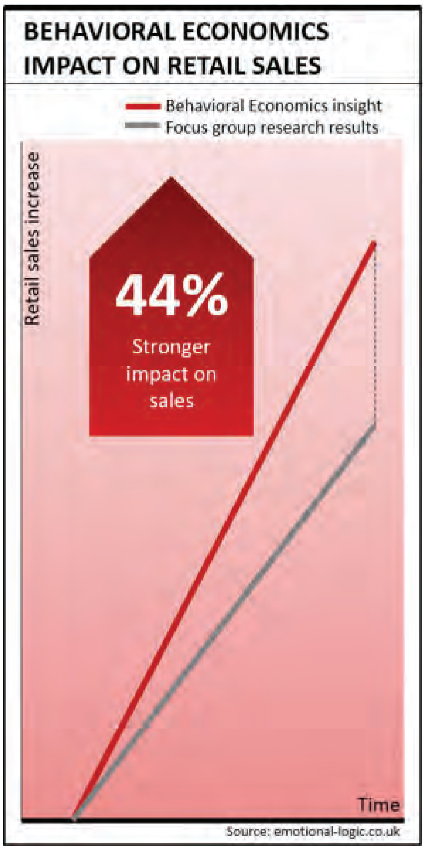
and reveals the motivations that are driving current habits so brands can influence and change them.

Behavioral economics delivers 44% more sales on the same marketing budget

Emotional Logic, one of the leading providers of behavioral economics-based consumer research, conducted a study with a U.K. retailer which proved simply asking consumers about their purchasing behavior isn't effective. A behavioral economics-based methodology was used alongside traditional focus group research to identify the drivers of loyalty (in this case, repeat purchasing transactions). In focus groups, consumers explained why they repeatedly came back to the retailer (factors such as value for money and staff expertise). The behavioral science method then identified several other factors around how consumers felt during and after the transaction. When the identified factors were tracked against repeat purchasing, the aspects that consumers had said they wanted during focus groups showed a much lower link with sales than the factors identified using a behavioral economics approach. On average, factors derived through behavioral economics had a 44% stronger impact on repeat sales transactions – proving that this approach gets us closer to real behavior and results.

How behavioral economics works

A behavioral scientist understands how consumers process information and subsequently how they behave and react. This is different to how consumers think they react. Consumers think they want an orderly and simple product shelf yet eye-tracking reveals they spend more time engaging with the messy shelf that has not been restocked properly. They say they are worried about plastic packaging but then overwhelmingly choose the plastic bottle in choice experiments.



Applying a behavioral economics approach means stopping simply believing what consumers are saying and instead researching what is really driving their behavior. Emotional Logic has worked with clients such as Jaguar Land Rover, Unilever and the British Heart Foundation to cut through the noise of consumer opinions and find the core of the behavioral shift they wish to achieve.

Maybe you have heard of System 1 thinking – the fast, automatic and often unconscious reactions humans have – which is the current buzzword of market research. Many new approaches attempt to quantify the effects of System 1 on buying behavior – often in isolation. But this is a risky approach.

Human beings switch seamlessly between the unconscious, emotional gut reactions of System 1 and the logical, step-by-step thinking of System 2. Both are essential for decision-making and in order to truly understand consumers, both have to be researched. For more than a decade Emotional Logic has been doing just that as a core element of the research delivery.

Each of Emotional Logic's research solutions, for example, combines traditional research techniques with tools from neuroscience and psychology to ensure both System 1 and System 2 factors are accurately measured. This approach delivers a more accurate picture of real decision-making, resulting in a stronger impact on actual buying behavior.

Get actionable results, not jargon

When it comes to System 1 measurements, hardly a week goes by without another new research methodology being launched. Eye-tracking, biometric measures, implicit testing – none are new but all are redeveloped continuously.

One of the challenges many organizations face is keeping up to speed with who is the best provider and assessing which tool is best fit for what purpose. And then there are the reports – many of us have seen the overcomplicated eye-tracking report showing 30 different "interesting" measurements only to be stumped by what to do with the results.

Using a methodologically neutral provider such as Emotional Logic gives brands access to a wider range of tools available and ensures that the most suitable methodology is applied to each research problem. The reports you get deliver a clear set of a few key metrics which indicate direct actions. Behavioral economics is one of the key growth sectors within market research because it delivers commercial results. Maybe it's time to add it to your research portfolio in 2020.

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Latent cluster modeling – an intuitive overview

| By Shiv Raman

snapshot

Shiv Raman argues that the power and flexibility of latent cluster modeling make it a great tool for market segmentation studies.

Over the last 20 years or so, latent class modeling has replaced hierarchical cluster modeling as the go-to methodology for market segmentation studies. The reasons for this are many: the ability to include variables of differing scales, the availability of clear statistical criteria with which to evaluate segment quality and quantity and, most of all, clarity and actionability of the resulting segments. While the benefits are clear, the conceptual underpinnings of the methodology are not so obvious to non-specialist audiences. This makes it difficult to communicate aspects that are unique to latent cluster models, particularly the distinction between indicators (or endogenous variables) and covariates (or exogenous variables), which are absent in traditional clustering methods. The goal of this article is to provide an intuitive description of the methodology, along with examples using simulated data to illustrate the relevant concepts.

It is helpful to begin our discussion by understanding the key distinction between traditional hierarchical clustering methods and latent cluster models. The former is based on grouping people together based on how "close" they are to one another using Euclidean measures of distance. A common clustering approach, agglomerative hierarchical clustering[1], starts by assuming every respondent belongs to a separate cluster and then groups people who are close to each other based on a proximity matrix. A proximity matrix is simply an *n* by *n* grid of distances between *n* respondents, where the diagonal is zero, representing the fact that the distance of a point with itself is always zero. The off-diagonal elements are the distance between each respondent on the measured variables. There are various ways to measure this distance (or similarity) and the right measure depends on the shape of the clusters and is not always obvious. The algorithm works by grouping together people with the smallest distance amongst them into a single cluster and then recreating a new proximity matrix. This process continues until the algorithm reaches a pre-specified number of clusters.

In contrast, the underlying principle of latent class modeling is that the data contains a mixture of several distributions and the goal of analysis is to "un-mix" the distributions and assign people to the distribution from which they were most likely to have been drawn. That is, in place of somewhat arbitrary measures of distance, we use a probabilistic framework to assign people into latent classes (i.e., unobserved segments) based on the observed data (i.e., the indicator variables). This idea of uncovering latent variables based on observed variables is quite widespread in multivariate statistics and is the basis of commonly used techniques in market research such as factor analysis and structural equation modeling (SEM). Factor analysis helps uncover the underlying constructs such as "price conscious" or "brand driven" that are indicated by observed attitudes and SEM goes a step further and uncovers the relationships amongst these unobserved constructs. When it comes to latent-cluster models, the unobserved variable

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is discrete, with k-classes, with each class representing a segment.

Follow distributional patterns

"A reasonable probability is the only certainty." This quote from E.W. Howe encapsulates what statistical analysis is fundamentally about. As everyone who has done at least an introductory course in statistics knows, most commonly observed phenomena follow distributional patterns with specific parameters, the most well-known being the normal distribution, whose parameters are the mean and the standard deviation. As discussed in the previous section, the goal of latent cluster modeling is to uncover the probability distributions of specific variables in the data. That is, we believe that the data in our sample are drawn from different distributions, each with its own mean and standard deviation. The trick is to figure out which distribution each data point (i.e., respondent) comes from.

The E-M algorithm and Bayes rule

The E-M algorithm and Bayes rule are two concepts that are essential in developing an understanding of the mechanics of latent clustering. In order to simplify the discussion, let us consider a data set containing measurements on a single variable such as respondent height. Further, we believe that the data consists of two distinct groups of people, i.e., the measured heights are drawn from two normal distributions with a unique mean and standard deviation. It is logical to assume that the two distributions correspond to males and females; however, we did not record the gender of the individual. Since we don't know which distribution any given person is drawn from, we make use of the expectation maximization (E-M) algorithm. The E-M algorithm starts by assuming a mean and standard deviation for each of the two distributions. It then looks at each data point individually and computes probabilities that the data point comes from either distribution, given those parameters. The process is elegant in its simplicity: the starting values of the mean and standard deviation can be plugged into the formula for the normal distribution to arrive at $P(x_i|d_1)$, i.e., probability of data point x_i given distribution d_1. Bayes rule is then used to arrive at the posterior probabilities of membership which can then be used to develop updated means and standard deviations and the process starts all over again until convergence is achieved. The prior probabilities, $P(d_1)$ and $P(d_2)$, can be assumed equal or computed from the data. These posterior probabilities are used to update the starting values of the means and standard deviations and the process starts all over again. We can do this because at the end of step one, we have a probabilistic assignment of (cluster) membership for each data point. To understand how the starting values are updated, assume that the posterior probabilities were either zero or one. Then the mean of distribution 1 would be the mean of just the data points that have a posterior probability of belonging to distribution 1, and the mean of distribution 2 would be the mean of just those data points that belong to distribution 2. In reality, the updated means are weighted by the probabilities of belonging to each distribution. In this sense, the latent cluster approach is a probabilistic extension of k-means clustering – whereas in k-means, data points are assigned wholly to one centroid or another, here data points have different probabilities of belonging to each distribution.

Bayes' rule

In the previous section, we stated that the E-M algorithm computes probabilities that a given data point comes from one of two distributions. An essential element of this computation utilizes Bayes rule, named after an 18th century Presbyterian minister and statistician, Thomas Bayes.

In the context of our example, Bayes' rule addresses the question: What is the probability of a specific data point, say a height of 61 inches, coming from distribution 1, i.e., $P(d_1|61)$? Bayes' rule states that:

$$P(d_1|61) = \frac{P(61|d_1) * P(d_1)}{P(61|d_1) * P(d_1) + P(61|d_2) * P(d_2)}$$

The corresponding posterior probability that the data point was drawn from distribution d_2 is simply $P(d_2|61) = 1 - P(d_1|61)$.

Note that $P(61|d_1)$ and $P(61|d_2)$ are computed from the formula for the normal distribution, using the initial estimates for mean and standard deviation we assumed for the two groups. $P(d_1)$ is referred to as the prior probability. In the absence of additional information, it is customary to assume equal priors.

Now, it is easier to see how E-M works. Bayes' rule ensures that data points that are "closer" to the d_1 distribution will have higher posterior probabilities of belonging to it and vice versa. Therefore, the new mean (and standard deviation) of each distribution will be more influenced by data points that are probabilistically more likely to have come from them respectively. Within reason, it does not matter what the starting values of mean and standard distribution are – the algorithm will "shift" the estimated distributions based on the observed data such that data that are more likely to have come from a particular distribution will contribute more to the parameters of the distribution.

Indicators and covariates

In this example, the height measurement variable is the indicator of the segments. What then is a covariate? The best way to understand the concept of a covariate is as a variable that helps drive class membership. Recall in setting up this example, we stated that we had omitted to record the gender of the individual. However, what if we had recorded estrogen levels? We could enter this into the model for the class membership as a covariate. In other words, covariates help predict the unobserved latent variables which are defined by the distinct distributions of the indicator variables: gender is the unobserved variable; height, the observed indicator variable, is used to derive the male and female distributions; and estrogen, the covariate, is helpful in predicting which gender a respondent should be assigned to. The schematic in Figure 1 illustrates the relationship across these three variable types.

A simulated data set will help clarify these concepts.

Figure 1

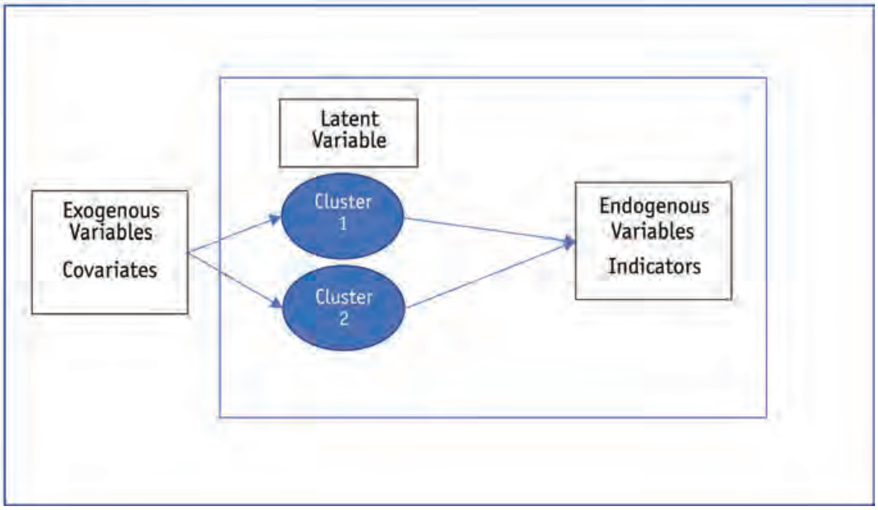


Figure 2

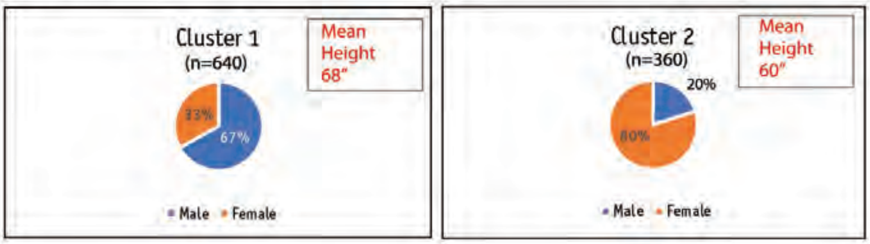


Figure 3

Specific properties

Simulated data is a great way to gain an understanding of how models work because we can give it specific properties and deprive the model of information that we know in order to evaluate its performance. So, with a wave of our hands (or a line of code) we create a binomial random variable for 1,000 cases with a *p* of 0.5. This will result in a variable with values 0 and 1 that each occur roughly 500 times. We label these male and female, respectively. Next, we generate a normally distributed random variable for height but, being data gods, we specify a different mean and standard deviation for males and females. So, in our data, the height variable for males has a mean of 69 inches and a standard deviation of 4.76; the corresponding values for females are 61 and 4.97. We are in essence creating a data set which is a mixture of two distinct normal distributions. Last, we create a normally distributed random variable to capture levels of a hormone called estradiol with means of 15 for males and 125 for females respectively. We can now test whether the latent cluster model is able to un-mix these two distributions because we know each respondent's group membership, information that we will withhold from the model.

We start by estimating a two-class latent cluster model using only the simulated height variable as the indicator. This yields one cluster that is 64% of the sample and another cluster that is 36% of the sample. Figure 2 shows the distributions of males and females (information we withheld from the model) within each cluster.

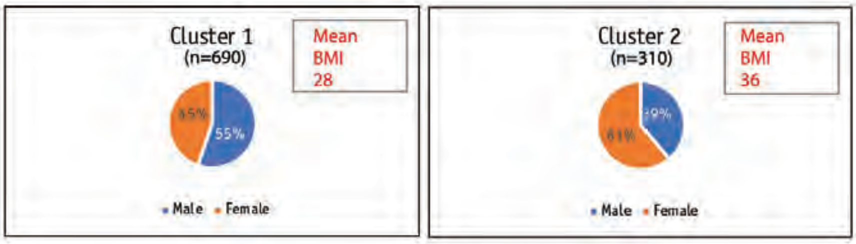
The model has succeeded in identifying a cluster that is predominantly male and another which is predominantly female. It has not, however, completely separated out the males and the females, although the mean heights of each cluster are almost identical to the means in the male and female groups in the simulated data. Upon close inspection, it appears that females who were on the higher end of their distribution end up in cluster 1 and males on the lower end of their distributions end up in cluster 2.

Now, let us estimate another model, with the estradiol variable entered as an exogenous variable (or co-variate). This model gives us two clusters, sized 53% and 47%, respectively. Figure 3 shows the distributions of male and female within the two clusters.

The male-female demarcation is much starker. The addition of the covariate enables the model to more accurately uncover the two distributions that we created, by design. The model has essentially un-mixed the two distributions we had generated! The addition of the covariate enables the model to distinguish the males from the females for those in the overlapping region where they have equal posterior probabilities of coming from either distribution. These results from the simulated data have important implications for the market research analyst.

Segment membership is inherently probabilistic. The parameters of the underlying distributions uncovered by the model are separate from who belongs in each segment. This is because different combinations of data points (or respondents) can yield similar distributional parameters. As we saw in the first model with the simulated data, cluster 1 included females on the high end of their distribution while cluster 2 included males on the low end of theirs. (It helps to visualize two normal curves side by side, the female distribution with the lower mean on the left and the male on the right.) Note that from a conceptual point of view, both solutions yield segments with the same underlying characteristics; i.e., taller people in

Figure 4



one cluster, shorter in another. Therefore, the question "Are these segments real?" is irrelevant. If our goal is to market products to people on the taller end of the height spectrum, the first solution will do just as well. We know these clusters are not the "true" clusters we simulated but we do not possess this information in the real world. This leads us to the second point.

Covariates do not alter the nature of the segments, merely who occupies them. Covariates impact the probability of cluster membership but do not impact the story underlying each cluster as told by the indicators. That is, a "cost-conscious" segment will remain so regardless of whether it is predominantly male or white or highly educated. The set of covariates we include in the model will simply enable cleaner targeting of the people in the segments, to the extent that there is a measurable relationship between these variables and the latent class membership variable. As we saw in our models using simulated data, the addition of the variable measuring estradiol levels as a covariate helped in predicting class membership more accurately because of its relationship to gender, and gender was the latent variable that yielded the data measured by the indicator, height. A common misconception is that the indicator variables in the model "determine" the segments. If anything, the opposite is true. That is, it is the latent variable that is responsible for the observed data. Just as an unobservable construct such as an underlying personality type construct results in observable personality traits, the indicators are manifestations of the underlying process by which the distributions are generated. This is clearly illustrated by our simulated data, where we literally created the height variable to be a function of what gender the respondent was.

Indicators, indicators, indicators. Data analysis in market research is different from more general "data science" because it is mostly based on a theoretical marketing science/marketing framework. We design surveys to address specific marketing objectives based on what we know of the marketplace such as the market structure, consumer preferences and so on. The attitudinal batteries in a segmentation survey are chosen based on hypotheses regarding consumer behavior, relevant decision drivers and product preferences. For this reason, data analysis is less a fishing expedition than it is an investigation within a carefully constructed framework. Viewed from this perspective, the choice of indicators is the single most important step in a segmentation (whether latent class or traditional). The most successful segmentation studies I have worked on started with a set of hypotheses and a carefully crafted survey to test them. The team chooses variables based on a similar process of hypothesis-generation and an understanding of what the collection of variables represents. Let us revert to our simulated data example. Suppose we had created a normally distributed variable for weight, using the same criterion we did for the height variable. That is, we ensured that men and women have distinct mean and standard deviations. A model which included height and weight along with the estradiol variable would essentially result in the same model as one with just height, i.e., it would uncover the two distributions we had simulated specifically to differ on gender (the simulated data shows this result but it is not reported here). However, what if we created a new variable, BMI, which is based on a specific ratio of height and weight? A latent cluster model based on the BMI variable yields two clusters, sized 69% and 31%, respectively, with the gender distributions shown in Figure 4.

The two clusters (i.e., distributions) uncovered by the model are clearly not distinct on gender, at least not the extent to which the height and weight variables were generated specifically to reflect gender differences. So, which of these segment solutions is the right one? The answer obviously depends on the needs of the marketer – the right solution is the one that is more useful. The key takeaway is that even if certain variables (i.e., height and weight) were the outcome of a specific process (gender), it does not mean that a mathematical combination of those variables is generated by the same process. Segmenting on BMI alone is not the same thing as segmenting on height and weight. This might seem obvious but it is remarkable how often this is lost in the process of selecting variables for the cluster model. The point is that choosing variables without thought to conceptual underpinnings can have significant impact on the characteristics – and therefore value – of the resulting segments.

Powerful element

Latent cluster modeling is a powerful element of the market research analyst's tool kit. Its flexibility with scaling of variables and the clarity of resulting segments makes it a first stop for most market segmentation studies. But its power and flexibility do not obviate the need to follow solid research design principles. Ultimately, the quality of the resulting segments is a function of the thought that goes into survey development and the quality of hypotheses generated by the research team.

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REFERENCES

1 Also widely used is k-means clustering in which a pre-specified number of random values are chosen as "centroids" and data points are assigned to each centroid based on a proximity measure. Centroid values are updated based on the data points assigned to each centroid and the process continues until there is no change in the centroids' position.

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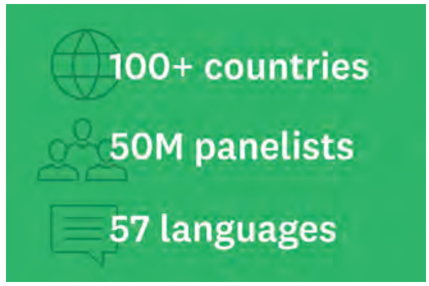

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Overcoming obstacles

Using CATI to survey unauthorized Hispanic immigrants

| By Erwin Chang

snapshot

Erwin Chang reports on the strategies employed to field and results from a comprehensive survey of unauthorized Hispanic immigrants.

The population of unauthorized Hispanic immigrants in the U.S. is considerable and ranges between 11 and 22 million people[1,2,3]. However, there has been a lack of nationwide quantitative studies based on the perspectives of unauthorized Hispanic immigrants regarding their immigration stories, life, perceptions and attitudes towards American culture and society. As a result, it is hard to understand the main problems created by this social phenomenon and to find plausible solutions.

Thus, the study profiled in this article tries to close the knowledge gap by focusing on various topics related to unauthorized Hispanic immigration in the U.S., including what would make the immigrants return to their country of origin; factors that influence their lives in the U.S.; crime; their political orientation; and their perspectives on the Trump administration.

Finding and convincing

One reason that prevents research organizations from conducting studies with unauthorized Hispanic immigrants in the U.S. is the difficulty of finding and convincing them to participate in a study. For instance, they may be afraid of talking to undercover officials from the U.S. government's Immigration and Customs Enforcement (ICE) agency and refuse to identify themselves as an unauthorized or undocumented immigrant.

Moreover, they learn that it is better to hide their immigration status to get or keep a job and do not want to be regarded as a type of pariah. Therefore, they feel uneasy taking part in this type of study.

Another challenge involves obtaining data that is representative of the unauthorized immigrant community. Although it might be easy to intercept Hispanics at Hispanic shopping centers, such data might be deemed neither adequate nor representative since it will be limited to certain demographics.

Online surveys are not an option either as it is not possible at this

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moment to find a panel provider that can provide enough sample size to represent unauthorized Hispanic immigrants from different countries of origin throughout the U.S.

However, computer-assisted telephone interviewing (CATI) has an advantage in that the phone number universe includes most/all phone owners, regardless of their language or their immigration status. Moreover, CATI is more representative than intercepts as it covers the entire U.S. continent rather than only a few small areas. Therefore, contacting unauthorized Hispanic immigrants by phone was the optimal method for this study.

The best approach was to call 75% of the prospective respondents by cellphone and 25% by landline in unacculturated Hispanic areas. Pay-as-you-go cellphones were also targeted because Social Security identification is not required to acquire them.

Nonetheless, this method also had its challenges. The most difficult one was gaining enough trust from the respondents to prevent them from hanging up or lying to interviewers when asked questions regarding their immigration status.

This was overcome by carefully selecting phone interviewers and scripting what they would say to fight refusals, overcome objections and gain the trust of participants. With that in mind, the interviewer team consisted of formerly unauthorized Hispanic immigrants who would be more empathetic with participants and more capable of building good rapport. All were bilingual and were recruited in Mexico, where the call center was set up.

The script that interviewers had to recite to introduce the study and gain trust was also key to keep participants answering the survey questions. It was developed with pre-tests and post-tests conducted to improve the previous wordings and increase the ratio of the number of successful interviews vs. the total number of calls.

Two pieces of explanatory text were included in the questionnaire. One was part of the introduction and the other was placed just before the question related to the immigration status of the participant. They included various important notices:

- that the organization behind the study is private and not part of the government or any of its agencies;
- that the survey includes sensitive personal questions;
- that answering the survey will enhance a better understanding of the immigrant Hispanic community and thereby allow organizations to use the study to improve policies and relations with Hispanic immigrants; and
- that their identities will be kept confidential and that the data captured will not include full names, addresses or other personally identifiable information.

The use of the right scripts by the right interviewers provided a significant increase in the response rate among unauthorized Hispanic immigrants.

Three groups

The status of unauthorized Hispanic immigrants in the U.S. can be divided into three groups. The first group is known as undocumented. It comprises the largest population of Hispanic immigrants and represents almost two-thirds of unauthorized Hispanic immigrants in the country. The second group, about a quarter, consists of those in the process of obtaining legal status if approved. The third group comprises around one-tenth and includes the recipients of the Deferred Action for Childhood Arrivals (DACA) status. DACA beneficiaries were included as unauthorized Hispanic immigrants because DACA does not provide lawful status according to the U.S. Citizenship and Immigration Services.

Information on why unauthorized Hispanic immigrants came to the U.S., how they

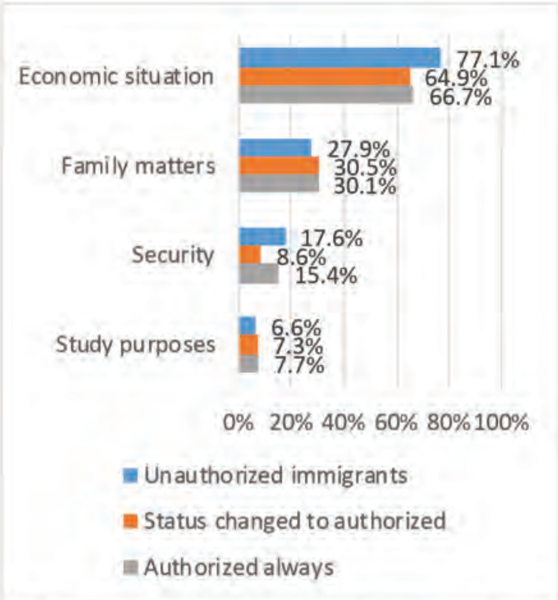

Figure 1: Top Reasons for Migrating to the U.S.

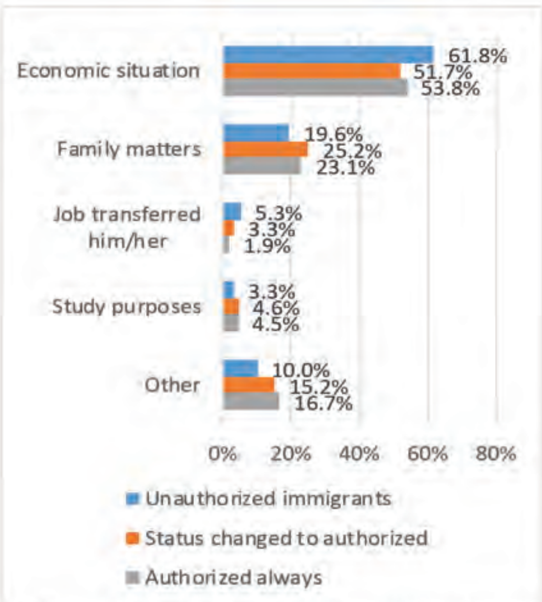

Figure 2: Main Reason for Migrating to the U.S.

managed to get into the U.S. and what might cause them to return to their country of origin is also essential for understanding other aspects of the unauthorized immigrant's life.

Two questions were posed to them during this study. One was intended to collect data on respondents' reasons for migrating to the U.S. and the other sought to identify which of the reasons provided was the most important. For both questions and the three Hispanic immigrant segments, the reason most frequently mentioned was the economic conditions in their country of origin, as illustrated in Figures 1 and 2.

Family issues emerged as the second-most pressing matter after the economic situation for both questions and the three segments as well. Security emerged as the third reason, with the majority of respondents mentioning it when asked all the reasons which made them move to the U.S. Nonetheless, security dropped to fifth place when asked for the main reason for migrating.

Another important reason for migrating is that some Hispanic immigrants came to the U.S. because their job required them to move there. Some decided to overstay beyond their work permit dates, while others found a way to continue being in the U.S. legally. This was the most important reason for migrating for one out of 20 unauthorized Hispanics and ranked third among the main reasons for migrating to the U.S.

The interviewees also mentioned the means by which they entered the U.S. The majority, two-thirds, entered the country with no documents by evading U.S. border controls. However, 23% of unauthorized Hispanic immigrants entered the U.S. with a non-immigrant visa that granted them a temporary stay in the U.S. More than one out of 20 unauthorized Hispanic immigrants entered the U.S. by passing border controls with another person's documents.

To understand the reasons for immigration from another perspective, and learn the attitude of immigrants towards any change of plans regarding their current residence in the U.S., this study asked participants for reasons that could cause them to return to their country of origin. This information was captured using a multiple-choice question and the answers were consistent with the reasons to migrate.

The top reason, given by a quarter of unauthorized Hispanic immigrant respondents, was the improvement of the economy in the country of origin. The second reason was family matters, raised by 24% of the respondents, as presented in Figure 3.

Having a job waiting for the unauthorized immigrant in the country of origin was another reason mentioned to return to the country of origin, with one out of 10 unauthorized Hispanic immigrants mentioning it.

As evident in Figure 3, only 3.3% of unauthorized Hispanic immigrants have plans to return to their country of origin. This figure suggests that the vast majority of unauthorized Hispanic immigrants came to the U.S. to permanently reside.

Life in America

Life in the U.S. has changed the modus vivendi of many unauthorized Hispanic immigrants. This opens a box with many questions of interest to better understand how unauthorized Hispanic immigrants live in the U.S. and what they think about life in America.

Unauthorized Hispanic immigrants are more likely to have a job (83%) than authorized immigrants (62%-64%). This phenomenon is consistent with the fact that the main reason for unauthorized Hispanic immigrants to come to the U.S. is the economic situation in their home country.

Those who are currently employed work around 45 hours per week on average, just one hour less than His-

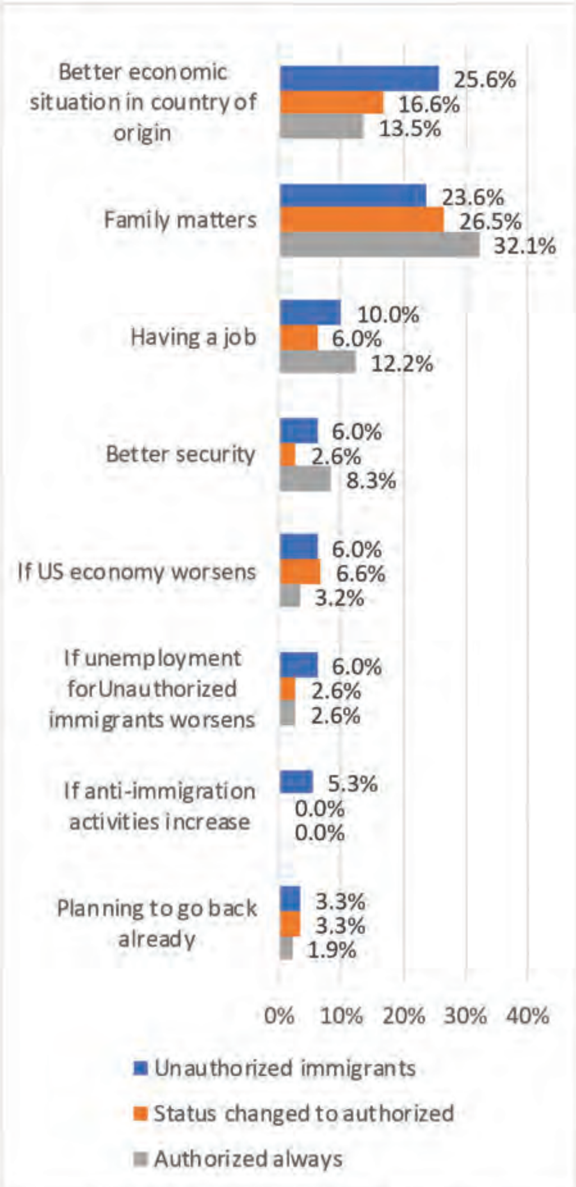

Figure 3: Reason for Returning to Home Country

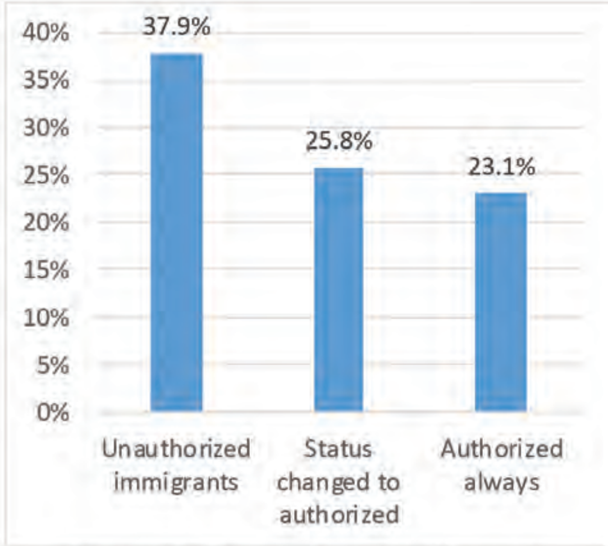

Figure 4: Percentage of Hispanic Immigrants Who Send Money to Country of Origin

panic immigrants who have always had authorized status.

While some critics argue that immigrants sending money back to their home country is not beneficial to the U.S. economy, immigration supporters note that unauthorized immigrants actually spend the largest proportion of their income in the U.S. and in so doing, greatly contribute to the U.S. economy.

Our findings show that 38% of unauthorized Hispanic immigrants send money to family and friends in their country of origin. This percentage is higher than the 26 percent of authorized Hispanic immigrants who say they do so and the 23 percent of those who were always authorized who do so (see Figure 4).

The money sent to Latin America usually goes toward basic needs such as buying food and paying utilities. This pattern is especially true for unauthorized Hispanic immigrants, as three-quarters of them send money for food, over 70% of them send money for utilities and 45% send for education, as shown in Figure 5. Figure 6 shows the percentages of income sent to their country of origin by the various groups.

Law enforcement attitudes

This study also tried to uncover the attitudes of unauthorized Hispanic immigrants concerning law enforcement. The questions were related to their willingness to assist police or report an incident if a crime occurred. Respondents had five choices to select for each question in addition to the "don't know" option. The alternatives went from "definitely I will assist [the police]" to "definitely I will not assist [the police]."

While the majority of authorized Hispanic immigrants will "definitely" assist the police if they witness a crime, less than 20% of unauthorized Hispanic immigrants stated the same. The rating differences between unauthorized and authorized Hispanic immigrants are considerable on this question. Nonetheless, this situation could present an opportunity to create an alliance between unauthorized Hispanic immigrants and local police to improve public safety.

Moreover, the percentage of unauthorized Hispanic immigrants who said that they would "definitely not" or "probably not" assist the police is higher than the percentage of those stating that they will "definitely assist" or will "probably assist" the authorities.

Unauthorized Hispanic immigrants are also less likely than authorized Hispanic immigrants to report a crime to the police, even if they were the victim. The percentage of those who would "definitely not" report or who will "probably not" report being the victim of a crime is higher than the percentage of those who stated that they would "definitely" or "probably" report an incident to the police among unauthorized Hispanic immigrants.

The reason most frequently stated (56%) by unauthor-

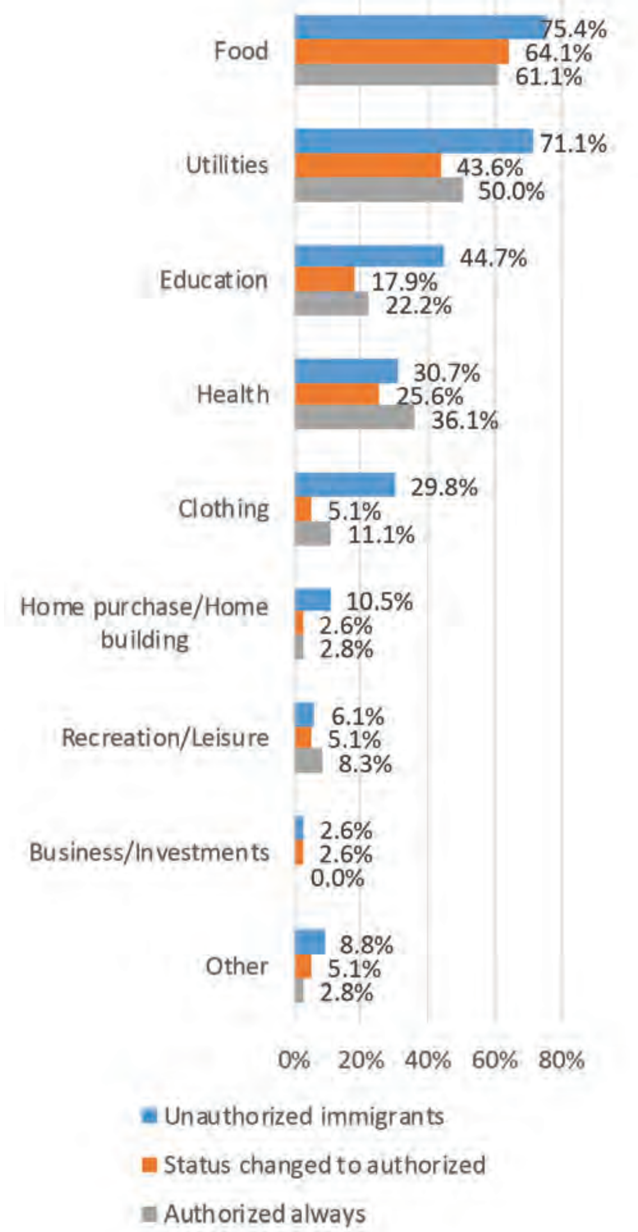

Figure 5: Use of Money Sent

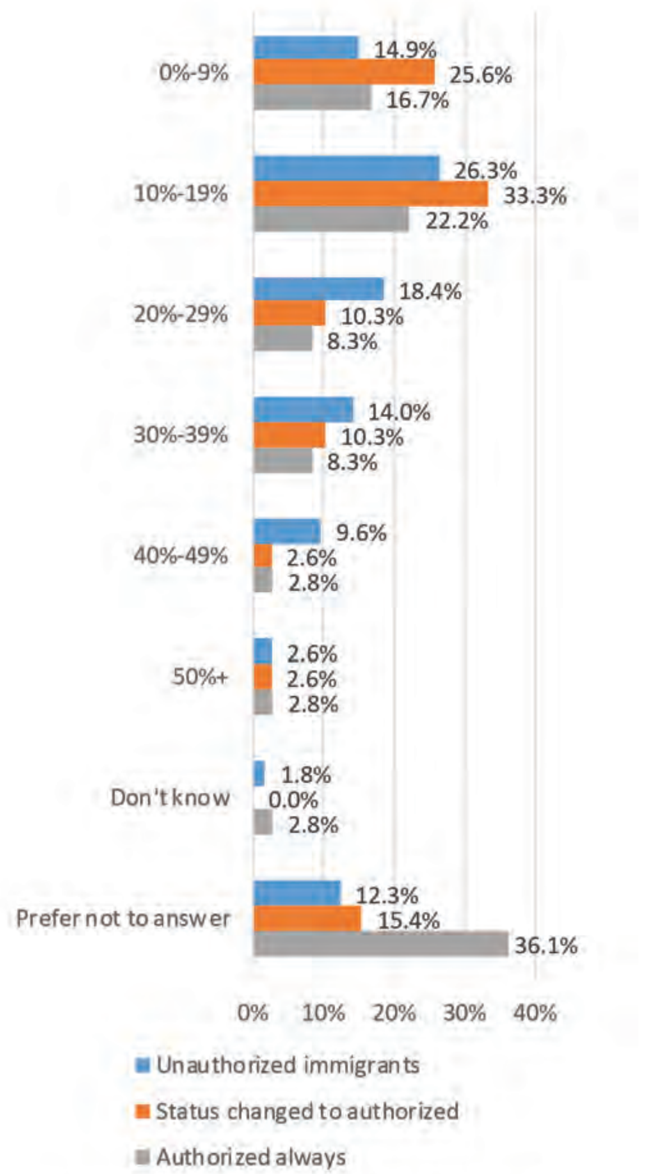

Figure 6: Amount of Money Sent as Percentage of Income

ized Hispanic immigrants for not reporting a crime or assisting the police is the fear of being detained or deported. This piece of data may be the key to developing policies that can help communities enhance public safety.

A fifth of unauthorized Hispanic immigrants said the reason they would not report a crime or assist the police is the fear of not being taken seriously.

The willingness of unauthorized Hispanic immigrants to help authorities solve crimes is substantially lower than the willingness of authorized Hispanic immigrants. Thus, law enforcement may need to develop new approaches to gain the trust of unauthorized Hispanic immigrants and enhance their confidence in law enforcement agencies. Figure 7 shows the reasons cited by Hispanic immigrants for not reporting a crime to the police.

Opportunities for a better life

The study also sought to identify factors that influence the life of Hispanic immigrants in the U.S. The factors explored include the economy, treatment from other Hispanic people, opportunities for a better life, work opportunities, public safety, American laws and treatment from U.S. citizens. Interviewees had to rate the factors in a five-point scale, plus the "don't know" option. The alternatives of the scale were "very good," "good," "neutral," "bad" and "very bad." Figure 8 shows the percentage of respondents who rated the factors very good or good (top-two box).

The majority of Hispanic immigrants rated the factors as very good or good, implying that they have positive perceptions of these important factors. The U.S. economy received the highest ratings by unauthorized Hispanic immigrants as over 90% of them said that the economy is

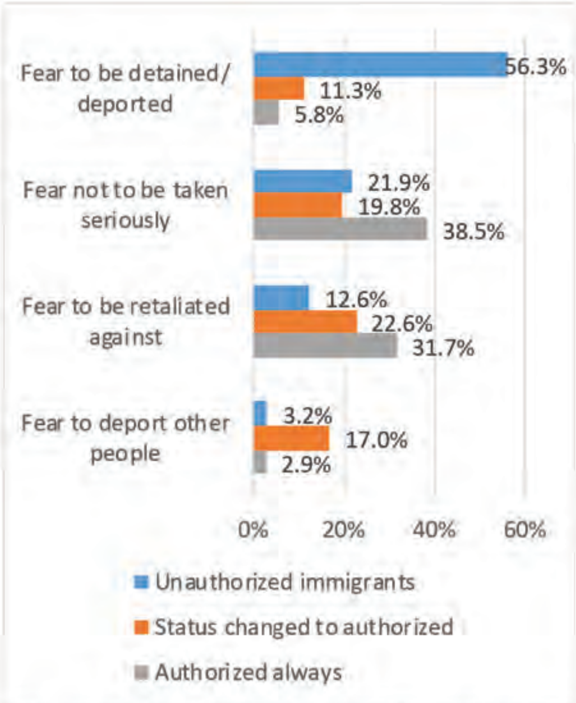

Figure 7: Why Unauthorized Immigrants Fear Reporting Crime to the Police

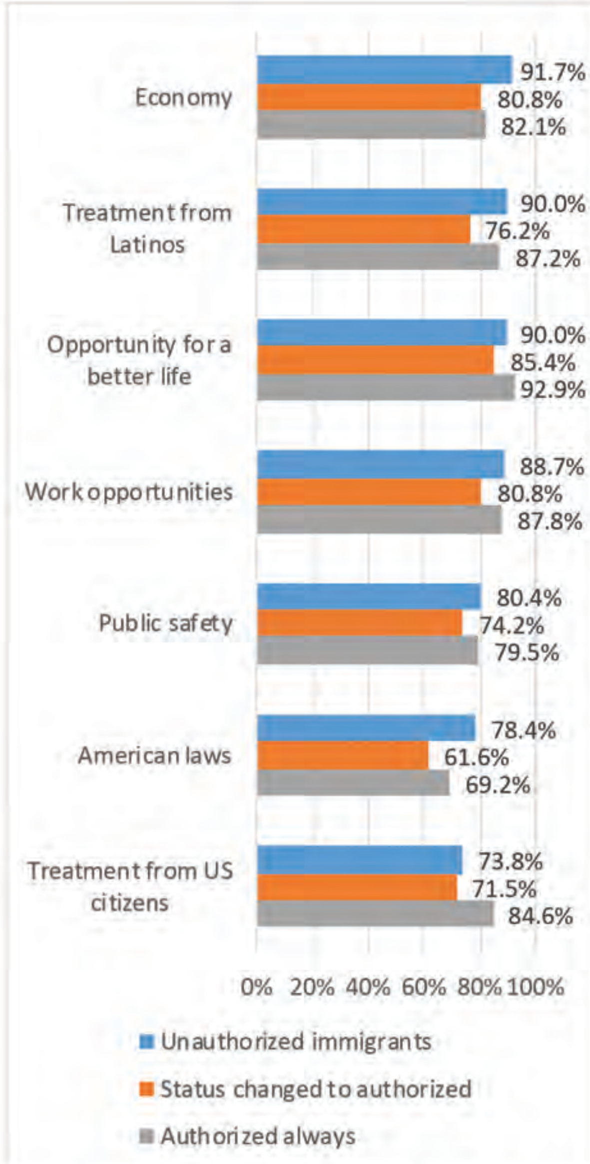

Figure 8: Life in the U.S. Ratings (percentage of people who rated factors "very good" or "good")

either very good or good. The treatment from other Latinos and the opportunity for a better life also received high ratings, as 90% of unauthorized Hispanics rated such factors as very good or good.

Generally, unauthorized Hispanic immigrants gave higher ratings to these factors than authorized Hispanic immigrant except for one question, the one related to treatment from U.S. citizens.

Consistent with the last set of questions, the vast majority of Hispanic immigrants interviewed in this study expressed that their lives have improved in comparison to their life in their country of origin. Indeed, almost two-thirds of unauthorized Hispanic immigrants stated that their lives "improved a lot" while about a third of them said that their lives had improved somewhat compared to life in their country of origin. The findings also show that unauthorized Hispanic immigrants felt that their lives had improved more than the life of any other group engaged in the study.

Even though their lives have improved and data suggest that they are not planning to go back to their country of origin, lawful Hispanic immigrants are less likely to become U.S. citizens than other immigrant groups.

Politics in the U.S.

The research team was also interested in understanding the perceptions of unauthorized Hispanic immigrants regarding politics in the U.S. The findings demonstrate that unauthorized Hispanic immigrants are less likely to support a political party, as almost half of them (46%) stated that they either do not support any political party or they do not have a political opinion.

Unauthorized Hispanic immigrants who support a political party represent less than a third of all unauthorized Hispanic immigrants surveyed. On the other hand, authorized immigrants are likely to support a political party. This attitude is especially true among those who have always been authorized, as two-thirds of them support a political party.

When Hispanic immigrants who support a political party were asked which political party they support, most of them, from all three segments, stated that they support the Democratic Party.

Unauthorized Hispanic immigrants are more likely than the other two Hispanic immigrant groups to support the Democratic Party. The findings show that 82% of unauthorized Hispanic immigrants support the Democratic Party compared to 76% and 66% for authorized Hispanic

Method notes

Data collection methodology: CATI
Field dates: October 15, 2018 to November 3, 2018
Sample sizes and margins of error:

Unauthorized Hispanic immigrants

Sample size: 301
Margin of error: +/-5.65% at 95% of confidence level

Authorized Hispanic immigrants, status changed to authorized

Sample size: 151
Margin of error: +/-7.98% at 95% of confidence level

Authorized Hispanic immigrants, always authorized

Sample size: 156
Margin of error: +/-7.85% at 95% of confidence level

immigrants who were unauthorized before and for authorized Hispanic immigrants who have always been authorized, respectively.

The study also examined the perceptions of Hispanic immigrants regarding 21st century presidential administrations. It asked to rate administrations on a five-point scale that ranged from "very good" to "very bad." Consistent with the political party that Hispanic immigrants follow, Barack Obama was the president with the highest percentages of positive ratings. Two-thirds of unauthorized Hispanic immigrants stated that Obama's administration was either good or very good.

On the other hand, President Donald Trump received the lowest positive ratings of any other recent U.S. president. The outcomes indicate that only 11% of unauthorized Hispanic immigrants stated that his administration was good or very good. Trump also stood out as the president with the highest percentages of negative ratings. The study findings showed that half of the unauthorized Hispanic immigrants rated Trump's administration as either bad or very bad.

In contrast, only 3% of unauthorized Hispanic immigrants affirmed that Bush's administration was bad or very bad, while less than 2% indicated that Obama's administration was bad or very bad.

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Conservation effort

Physician respondents are not a limitless resource

| By Paul Golota

snapshot

To save the future of health care sampling, Paul Golota writes, we need to nurture rather than plunder.

Building a health care-focused data collection company over the past two decades has been an interesting, rewarding and oftentimes frustrating process for me. The challenge of executing research with geographic constraints of an earlier era has been replaced by more recent concerns of adequate sample supply, vendor transparency and the quality of respondents and data.

Before diving deeper into the issues of today and tomorrow, it's worth a trip back in time to remember the early days of recruiting physicians for market research surveys. While this article may have some characteristics of a "remember when" story, it is rooted less in nostalgia and more in an effort to draw on some of the best practices of the "good ol' days."

The internet has certainly made it easier to accumulate and reach health care professionals but these gains have not been made without significant sacrifices. As many sample suppliers have invested in expanding the size of their health care panels, the quality of the relationship between the health care professional and the sample supplier has deteriorated. The lack of focus on providing a great, personal experience to panelists has manifested in a number of ways over the years and will continue to be a growing problem for the industry in the years to come. As an optimist, I reject the notion of "doom and gloom" and believe that we get to shape the industry we want to have; however, it will take a significant mind shift in how we approach panels and the experience respondents have with companies in our industry. The future belongs to those who can learn how to marry the best practices of the past with the technological advancement of today and tomorrow.

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A lot more fragmented

It was only a short two decades ago when I was introduced to the world of medical market research. I had just started college when I found a job at a local company specializing in conducting telephone surveys with patients, physicians and other health care professionals. Sharon Ricca founded Ricca Research in the late 1970s after a couple of years as an independent contractor for some of the local market research agencies. Having stumbled onto a few health care projects amongst other consumer work, she took to interviewing local physicians and decided to focus all of her efforts on building a health care-focused data collection company. The health care market research industry was a lot more fragmented in those days: almost all of the research was conducted locally and in person. If the rare need to survey physicians in a different region arose, you would have to make a call to one of the companies in that local market and hire them to recruit and survey physicians, fill out the paper questionnaires and ship them to you for processing.

It's disorienting to remember a time when calling phone numbers outside of your local area was unusual and, often times, cost-prohibitive. Ricca enjoyed visiting the physicians in the area and interviewing them on a range of health care topics. She researched the topics beforehand and came prepared to have a substantive discussion with plenty of follow-up questions. The physicians also seemed to enjoy the conversations, as they always made time for her, even going so far as to invite her to their homes for interviews following a family breakfast.

The insights they provided were always detailed and thoughtful and there was never a concern about the identity of the participants or the quality of their responses. Even as the business evolved to more telephone interviewing and expanded its reach to a national audience over the next two decades, there was always a confidence in the quality of the respondent and the information they provided.

When I joined Ricca Research in 2001, the company maintained a database of friendly physicians who had participated in past surveys. E-mail had just started to emerge as a mass communication tool, so most of the recruiting was still being done by telephone and fax. We continued to grow the database of "friendlies" by calling new physicians in markets across the country, using phone books from cities across the United States, which diligent employees had brought back after vacationing with their families. It may seem silly now, but there was no way to just find a phone number for a physician in a different city other than by calling the directory service with specific information or by consulting a phone book.

As I think back to the thousands of conversations I've had with physicians all around the country in those years, each call felt personal and engaging. We were trained to respect their time, prepare for discussions, engage them in a dialogue on the topic at hand and provide "wow" customer service at every turn, before it was the cool thing to do.

There was a clear sense of how important each and every respondent was to our ability to get projects done and for the company to be a success. It also wasn't uncommon for physicians to ask for us by name and for us to know some personal details of some of their lives. The first few minutes of a conversation could sound like friends catching up. Our friendly physicians didn't number in the hundreds of thousands but the ones we had were consistently engaged and provided great feedback to our clients.

Surprising and disappointing

It's not surprising that the proliferation of the internet and the emergence of new technologies over the past two decades substantially changed the way in which health care professionals are recruited. What has been surprising and disappointing, however, is seeing new (and some old) health care sample suppliers mistreat physicians and other health care professionals as if they were a limitless resource. The barriers to entry for operating as a health care sample provider have all but disappeared with the emergence of purchasable physician lists and mass communication services. For someone who has been in the industry for some time and understands the value of each respondent relationship, it's been frustrating to watch fly-by-night companies purchase questionable marketing lists of physicians and use them to spam potential respondents. While the effort has yielded some results, it has cheapened the relationships built over prior decades and has done real damage to the industry as a whole.

As response rates started to decline, it became more and more important for these companies to build large panels so that they could achieve the desired sample sizes. This also had the added benefit of marketing the "impressive" panel counts to customers, although proving to be useless in predicting project success. Building and maintaining large panels has a significant drawback: the bigger the panel, the harder it is to create a positive experience for each member within the panel. To maintain an excellent level of support for the hundreds of thousands – and sometimes millions – of panelists these companies claimed to have would have taken a significant investment, which was rarely made. Normally, this would create an opportunity for good companies to separate themselves from the competition and become the go-to survey brands for health care professionals.

While this may be true in some cases, it is also true that busy health professionals have a hard time distinguishing between good and bad actors in market research. After all, these respondents already have very demanding day jobs that have become increasingly more time-consuming and stressful in recent years. Having spoken to many physicians and published previous white papers on the topic, we have found that physicians find their in-boxes flooded with survey opportunities that often do not provide incentives in accordance with fair market value, that questionnaires are becoming unbearably long and complex and that there is frequent disqualification due to broad targeting criteria and the increasingly specific requirements of each study.

When respondents complete a survey, they often do not see the compensation for a long time and are not provided with a direct line of contact to customer service at the survey company. It's typical in the industry that respondents are provided with a generic e-mail address with an unreasonable response time to follow up on their incentive status. In more frustrating cases, respondents experience a technical issue, report it and receive a response several days later notifying them that the survey had already closed and that their participation is no longer needed.

Take a moment to process this experience and ask yourself whether you would continue to participate under the same set of circumstances. As the industry churns physicians and other health care professionals every year, many companies fail to understand the true impact of this loss. Because respondents generate a recurring stream of revenue for the company as they participate in survey opportunities, it would be appropriate to apply some common e-commerce metrics to understand the value of each respondent. Having done the exercise with our team, I can report that the potential lifetime revenue for each survey respondent is in the high five figures. If you consider that many respondents are members of multiple panels and may get turned off from all market research after a bad experience with a single company, the potential loss of revenue to the industry is in the hundreds of thousands of dollars.

Unlike in the world of consumer research, the universe of health care professionals is extremely limited and their ability to participate in any given study is further reduced by their busy schedules and increasingly strict project criteria. We've highlighted this trend in a recent white paper, asking a random sample of physicians about the likelihood of participating in market research surveys in one year and in five years from today. Across all specialties, physicians indicated that they would be less likely to participate in five years compared to a year from now. As an industry, we simply cannot afford the churn if we want to continue delivering on client sample requests.

Reverse the damage

Considering how valuable each respondent is to the future of our industry, what can be done to reverse some of the damage done in recent years? Thinking back to my start in the industry and the way Sharon Ricca trained us to care about each and every health care professional, there would have to be a major mind shift in how sample companies relate to their panelists.

For one, it's healthy to question the need for a very large panel. This may seem counterintuitive but if you really stop and think about it, is it all that crazy? Before writing the idea off, it's worth running diagnostics on your current panel to understand whether there are panelists who never receive survey invitations because their specialty or job function is not in demand for market research. If those people exist, why bother maintaining the overhead that comes with having to service those members? Why not build a smaller, more engaged panel with a renewed commitment to properly servicing the membership in the same way we did 20 years ago but with all the benefits of modern technology?

How do we convince sample companies with a customer service e-mail address to move to an exceptional customer service model found in today's most successful e-commerce operations? Sure, it becomes a bigger cost center to the company but there is a tangible value in retention and engagement that will be reflected in

company revenue. After all, health care sample companies are unique in that they are effectively a marketplace that serves to connect brands with the experts who provide experience and opinions.

Without a healthy supply of respondents, the model starts to break down. In the best-case scenario, the project completes at the expense of the gross margin and in the worst-case scenario, the project falls short and the customer walks.

Many panel companies operating in the health care sample space today behave more like mass marketing agencies, sending e-mail campaign after e-mail campaign of survey invitations until there is no more respondent engagement. That may work for projects with few restrictions and audiences that have a large universe size but for the majority of health care projects, it presents a challenge in getting to the desired sample size.

When recruiting hard-to-reach health care professionals, for quantitative or qualitative efforts, it is more effective for sample companies to think and act like a specialized recruiter and not an e-mail marketing company. It may require an investment but in the long run it is more sustainable than tanking the project gross margin or churning customers.

Perhaps there may be a time in the future when asking people for their opinions may be replaced with machine-generated insights from tracked data. Until that day comes, we're at the mercy of extremely busy individuals whom we are asking to provide those opinions at the expense of spending their limited free time on other things. As a physician friend told me once when I asked him what sample companies could do to entice him to take more surveys: "It's simple – create a better experience for the survey respondent."

Of course, we can roll our eyes at this overly broad statement but if we take a moment to think about it, is he all that wrong? If you were a busy professional and a member of your company's panel, would you participate? Would you tolerate 10 minutes of screening questions just to be told you do not qualify and will not be compensated? Would you tolerate waiting more than a year for your incentive without any response from customer service? Would you be able to spend 60 minutes of your time taking a poorly-designed survey on your mobile device? The success of tomorrow's health care sample providers lies in the honesty with which we answer these questions.

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Listening in

Getting behind doctors' closed doors with role-play

| By Liz George

snapshot

The author uses an oncology treatment example to demonstrate the value of using role-play to understand and learn from doctor-patient interactions.

Where some industries have the benefit of conducting ethnographic or observational research to gain insight into key conversations or decision-making moments, this is not always the case in health care. With my research in pharmaceuticals, it can be difficult to gain access to some of the most important conversations to learn from, because they happen behind exam room doors – and rightly so, as patient privacy is top industry priority. With the increasing challenge and value in learning from those closed-door conversations, creativity is needed to access the learnings from these interactions. Leveraging role-play is one approach to unlocking those insights.

The gold standard for real-world insights is immersive, ethnographic research. However, there can be significant barriers that limit our abilities to conduct this style of research – particularly when our goals are to understand a specific decision or conversation that takes place in the journey of a disease state.

Logistical hurdles. The coordination of finding patients and physicians at the right points in time and being able to secure consent from all parties can certainly be done but it often takes time that our clients simply do not have or it exceeds the budgets that would be reasonable.

Regulations and privacy. The increasing protections of patient privacy are an essential component of today's health care system but they create significant limitations for researchers seeking access to capture photography or video within physician practices. Added to that, while we may obtain a physician's and patient's consent to in-situ research, securing institutional permissions to access the practice is an entirely different challenge.

Ethical considerations. Having spent the last few years focused heavily in oncology business decisions, it's clear to me that certain conversations deserve to remain sacrosanct between a patient and their physician. The moment when a patient receives a metastatic cancer diagnosis and is being explained their treatment plan is certainly a time where they deserve the privacy to react, emote, question and process – without additional eyes on them.

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In the full context

So, how can you achieve immersive learning without actual immersion? The answer is simple: simulation. Seasoned moderators often simulate conversations with physicians in the context of in-depth interviews. "Doctor, I'd like you to speak to me as if I were your patient and you were explaining this product to me." It is an effective approach, except that the physician's response is typically abbreviated, lasting about 45 seconds, when we know the full conversation takes as long as 30 minutes. Role-play, as a research tool, takes the same idea but immerses respondents in the full context of the conversation. The research team provides background, a simulated environment, a prepared actor, and we ask respondents to engage in a given conversation as they would in the real world.

You may be surprised to learn how comfortable physicians are with role-play; in fact, it's a core part of their medical training. Given that doctors speak with patients every day, placing them in a scenario to have a natural, reflexive conversation reveals more truth than asking them to recount such conversations artificially.

Role-play is an especially valuable methodology when core research objectives seek to understand a specific conversation, interaction or decision-making process. Where we might prefer ethnographic or in-situ observation, role-play provides a time- and cost-efficient alternative that yields similarly rich insights. Specific objectives that are a great fit for role-play include: understanding language or dialogue around a topic or product; exploring decision-making or recommendations in the moment; exploring how specific variables may shift decisions or conversation.

To help bring this idea to life, let's set the scene: Our client, a global pharmaceutical company, was preparing for the launch of a first-in-class oncology treatment indicated for an advanced tumor. When approved, this product would change the existing treatment paradigm, as an addition to the current standard of care and, ultimately, change the nature of treatment conversations that physicians would have with patients.

The challenge

Our team was eager to understand the dynamics and dialogue of today's current treatment conversations around this tumor and its treatments. Because its product would be indicated as an additional adjuvant therapy, our client needed to ensure that its product's positioning had synergy with the existing standard of care. But, the client was also eager to learn how that treatment conversation would change with the addition of its product.

We could easily have relied on technology and applications to learn about the treatment conversations or even pursued other ways of simulating the conversation, such as virtual reality. However, we felt strongly that to really understand the human interaction between physician and patient, we needed a methodology that would allow us to fully explore both the rational and emotional dynamics of the conversation.

The preparation

Much like actual theater performance, all the hard work happens behind the scenes with role-play. Leveraging foundational patient research and deep knowledge of the disease state, we developed our scenarios and our patient personas. The actors cast to portray our patients were provided with more than a medical history – they were given in-depth lifestyle and family background, emotional character development and specific context about their disease (how they came to be diagnosed, their reaction in that moment, their underlying fears about the disease). We felt it was important that when these actors entered the simulation with a physician, they would be prepared to behave, speak and emote as realistically as possible.

We know physicians will tailor their dialogue and explanations based on a patient's needs and personality, so we prepared two different patient types that we had come to understand in foundational patient research:

Joe: A blue-collar, semi-retired male who lives with his wife, he hates going to the doctor unless he really has to. He's had a few health problems but relies on his doctor to tell him what to do. His wife does have to remind him to take care of himself and he only got himself checked out because she pushed him – and then he found it wasn't just a cough; it was cancer.

Madelyn: A hard-working, ambitious corporate professional who puts all of her effort into her work, she's never had any health issues before. But after a car accident, she had scans done in the ER and her cancer was discovered. She immediately went into action mode, reading everything she could and trying to figure out what her best options would be.

The creative approach

We prepared physicians at the recruitment phase to expect role-play as part of their participation in the research. The research engagement began with a brief discussion of their practice and the challenges of treating this tumor type. Then we set the scene for the first role-play by providing a patient chart, explaining that this was their first consult with Joe or Madelyn, where they would be reviewing the treatment plan. After observing the physician-patient conversation, we debriefed with the physicians to understand why they chose certain language or made certain decisions. Then, we showed a product profile and asked them to engage in a second role-play – this time in the hypothetical future when Product X was available. Again, our patient came in and the physicians engaged in the simulated "future state" conversation, followed by another debrief before the interview closed.

The outcomes

After conducting these role-play simulations in markets across the U.S., we discovered that by examining the dialogue of these conversations, we were also revealing key emotional learnings and valuable product insights. Our human approach took us beyond the conversation and into the unmet needs within this tumor setting. It helped us understand what was most important to physicians through what they shared with our patient actors.

The unexpected and beneficial outcomes of the research included:

Direction for brand positioning territories. While physicians expressed receptivity to Product X, it was the observation of how expectations were framed to patients compared to the current treatment paradigm that revealed unmet needs and underlying physician tensions – creating paths to the brand's positioning.

Language to inform brand messaging to health care providers (HCPs). Our detailed analysis of language and dialogue revealed valuable words, phrases and metaphors that directly informed message development.

Insight for disease state and patient messaging. By listening and collecting the various terminology, analogies and explanations provided by the HCPs to the patient actors, the marketing team effectively built upon and employed these tried-and-true strategies in their campaign development.

Ensure success

In employing role-play as a health research methodology, here are a few notes from the director's chair to help ensure success.

- Remember, it's improv, not Broadway. It's important to know that we did not give our patient actors a script to follow. Such a formulaic tactic would have dampened the human aspect of our approach. Part of why our physicians were able to engage in the simulation is because the actors behaved like real patients – depending on the character direction we gave our actors, they deferred or challenged, emoted or withheld, and interrupted the doctor with hard questions. Each engagement in the research was different, as the actors reacted and improvised based on the different language and approach the doctor took. The patient actors read and reacted to the doctor as a person, too, which is why we got closer to reality than other simulation exercises.
- Learn, iterate and adapt. When we discovered in our initial conversation with a physician that he or she had a certain perspective or approach, we gave quick guidance to our actors to explore that feature somehow – prompting with a question or reacting emotionally to a specific phrase. One of the advantages of role-play is the ability to manipulate variables to understand how they influence dialogue, language or decision-making.
- Preparation is everything. To prepare our actors, we had to deeply understand the patient experience, which required quality foundational research. It was only through real patient experiences and emotions that we were able to fully develop characters for these scenarios. Equally as important was preparation for our physician respondents – making them aware of the role-play in advance, providing any tools or materials they might need during the scenario and creating an environment that feels natural to them (an exam room or office).
- Consider the other influences in conversations. If decision-making is critical to the research objectives, it is essential to consider who else might need to be involved in the simulation. Are caregivers present? We may consider preparing caregiver actors to join our patients. Do different specialists work together to present the treatment plan? We may recruit both specialists and give them time to discuss the case before bringing the patient actor in. To learn effectively, it is essential to be thorough in simulating all of the appropriate variables.

Must be relentless

As researchers, we must be relentless in finding creative ways to access real-world human insights, even when the behaviors and decisions that we are after happen behind closed doors. Role-play is just one of our ways behind those doors.

While health care, pharma and finance face similar challenges and the privacy dynamic continues to evolve globally, clients across industries may find themselves working harder to observe decision-making that may once have been more accessible. When doors are closed, identifying ways to ethically and creatively access insights helps ensure we are not locked out.

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Zebras do exist

The diagnostic odyssey of rare-disease patients

| By Wes Michael

snapshot

Rare-disease sufferers sound off on their diagnoses and their battles with the medical community.

In the rare-disease community, you hear a lot about zebras. Why? In medical school, students are taught, if you hear hoofbeats, think horses, not zebras. That makes logical sense. What is the most likely diagnosis? It is more likely to be a common "horse" than a rare "zebra." But, as you hear over and over from rare patients, zebras do exist. And physicians need to be aware of when to go beyond the horse to spot the zebra. Because the longer they suspect a horse, when it really is a zebra, the longer it will take to get to the correct diagnosis. And that means a longer time without treatment.

I was recently at a rare-disease conference and a patient said, "We talk a lot about finding out about the patient journey. Please don't call it a journey. A journey sounds like something you'd find enjoyable. Please call it an odyssey. That is more accurate. It is not a fun experience."

How true! What is the patient odyssey? How does it vary by disease? We set out to survey our patients and caregivers to find out their perspective. We asked patients or their caregivers about their disease, which (if, as is common, they have more than one) was most difficult to diagnose, and then, for that disease, how long it took to get diagnosed. We also asked how many medical tests they required, how many physicians they needed to see, were they misdiagnosed along the way, if they had genetic testing and if they experienced a delay in treatment. We provided the opportunity to explain in an open-ended fashion their experience.

There are about 7,000 rare diseases. We surveyed 3,471 of our patients and caregivers across 436 different diseases. We'll focus on totals, several instructive diseases and results from those diseases where there are 10 or more responses. The results may not be representative, as respondents more interested in sharing their negative experiences in the diagnostic odyssey may be over-represented. But you'll hear the authentic voice of the patient. And we are happy to share freely the data to any interested parties.

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A much more extended wait

The story of the diagnostic odyssey is more relevant as 436 separate odysseys, as each disease or condition reveal different results. But let's start with some totals. Across all the conditions, the average (mean) time to diagnosis was 4.4 years. The median time, however, was 1.1 years, indicating that half the sample came to their diagnosis in about a year. But it also shows, many had a much more extended wait.

On average, patients had seven medical tests taken to get to their diagnosis and saw four physicians. Nearly half (46%) were misdiagnosed along the way and nearly half (47%) believed their treatment was delayed.

Nearly one-third (30.5%) reported having genetic tests taken and, among those, two-thirds (66.9%) stated that the genetic test led to the correct diagnosis. Three-quarters (76.8%) said their genetic tests were covered by insurance.

Many different pictures

If we look at the 61 diseases where we had 10+ respondents (Table 1), we see many different pictures. Ankylosing spondylitis, celiac, depression, Ehlers-Danlos syndrome, Fabry, mastocytosis, Pompe, and primary immunodeficiency all had a mean of over 10 years until diagnosis! Realizing that a few people that took decades to be diagnosed can drive the mean, we've provided the median as well and you can see most of these had a median of over five years until a correct diagnosis. That is a long time to be suffering from an unknown condition! These conditions also typically required a large number of physicians to be seen and medical tests to be taken. And a majority of most also were misdiagnosed along the way. Some conditions (ankylosing spondylitis, Ehlers-Danlos, hidradenitis suppurativa, mastocytosis and narcolepsy) had over three-quarters of the patients misdiagnosed. Nineteen of these 61 conditions had half or more of the patients misdiagnosed. And 30 of the 61 conditions had half or more suffering from delayed treatment.

Let's look at several of these conditions that represent different experiences in more detail: hemophilia, cystic fibrosis and Ehlers-Danlos syndrome.

Hemophilia

Hemophilia is a rare genetic bleeding disorder. Internal bleeding can damage joints and organs, and thus can be life-threatening. The most common types, A and B, primarily affect males, but females, who are carriers, can also be affected. Since hemophilia is a fairly well-known orphan disease and due to its genetics, families often anticipate the possibility of their child inheriting the condition. So, it is not surprising that the median time to diagnosis is 0 years, with 71% diagnosed in the first year. Many reported that it wasn't unexpected as they had a family history. But it can also be caused by a spontaneous mutation, which would not be expected. Several reported diagnoses at the time of circumcision. But others weren't diagnosed so quickly, as the mean time to diagnosis was reported at 4.7 years. One noted: "[The] pediatrician did not believe there was anything wrong. He felt we (parents) were responsible for the severe bruising." Several reported similar histories, adding insult to injury.

Females made up over half of those who that weren't diagnosed for 10 or more years. Since genetically it is expected to occur almost exclusively in males, it isn't surprising that females weren't quickly diagnosed. Some reported:

"[I] was told that some women just bleed heavily, have anemia, have extended length periods, bleed heavily after birth, bruise easily, just have joint pains. Outdated thinking and resistance to change in the medical community is why I went so long under-diagnosed and under-treated."

"No one ever looked at hemophilia because I am female. Once my daughter was diagnosed then I was, also."

"As a woman, I was only labeled a 'carrier' even though my factor level is in the 20s."

The impact of these missed diagnoses is striking. One male patient reported:

"I visited an emergency room multiple times, but the doctors had no idea that my bleeding could be hemophilia."

Cystic fibrosis

Cystic fibrosis is a progressive genetic disease that affects the lungs and other systems. It limits the ability to breathe over time. Most newborns are now screened for CF, which explains the short time to diagnosis, a mean of 3.3 years and a median of only .3 years overall. Three-quarters (75.8%) reported having a genetic test, which led to the correct diagnosis in over 90% of the cases.

"For us, nothing [could have led to a faster diagnosis]. The diagnosis was made as part of the newborn blood screening that is mandatory in Illinois. He was diagnosed at 12 days and confirmed a day or two later by a sweat test. We started therapy that week."

"I found out while pregnant. We were very 'lucky' as we were prepared at his birth."

"The fact that they now test at birth and had just started in 2001 made diagnosis all but immediate. Just need all states to be doing this."

We can see the impact of newborn screening. If we look at patients born since 2000, the average time to diagnosis was .75 years. But for those born before 2000, they averaged 6.6 years to diagnosis. Before 2000, 47% reported misdiagnosis (often asthma, allergies, bronchitis), while since 2000, only 20% reported misdiagnosis.

Ehlers-Danlos syndrome (EDS)

Ehlers-Danlos syndrome (EDS) is group of disorders that affect connective tissues that support skin, bones, blood vessels and other organs. This can result in a range of outcomes from loose joints to life-threatening complications. Various gene mutations have been association with the condition. It is diagnosed by symptoms and in some cases confirmed with genetic tests.

Of all the diseases in our study with 10 or more responses, EDS showed the longest time to diagnosis, with a mean of over 21 years. Over three-quarters (77.6%) were misdiagnosed. EDS patients/caregivers noted taking a mean of 24 tests and seeing over 15 physicians, among the highest in the study. Over 71% experienced a delay in treatment. About half (49%) had taken genetic tests and for two-thirds of them (66.7%) the genetic tests led to the correct diagnosis.

The stories conveyed by the respondents describe an especially difficult diagnostic odyssey, full of misdiagnoses.

"I was called a 'clumsy child,' when I would roll ankles or knees or dislocate fingers. As a teenager, 'accident-prone' and then each injury was treated separately. Sprained ankle, torn rotator cuff, dislocated foot, jammed thumbs, etc."

"A lot of doctors were confused by the laundry list of symptoms, not realizing that is typical. A lot of them interpreted that to mean that I was either exaggerating or had somatoform [psychological] disorder."

"EDS is rare but if someone had put all of my symptoms down onto one sheet of paper and actually tried to see how they connect I think it would've been spotted. Instead our health care is very linear. So many blood tests, X-rays, MRIs, more blood tests – mostly because that's what insurance told them they had to do."

Sufferers of this rare disease stressed the importance of raising its awareness among physicians:

"[We need] more awareness by other doctors and PTs. I saw multiple orthopedists for sprains and other injuries who never suggested 'Hey, this could be EDS.'"

"More teaching of EDS in medical schools, more awareness and understanding of the condition among doctors (this has improved in the last decade), more research into treatment and cure for EDS."

"My diagnosis came from clinical tests, not blood tests. PCPs should use the Beighton score more often as a test. It's easy to do and costs no money. I think that it should be a standard test when you have joint issues."

The delay in diagnosis had severe impacts on patient well-being:

"If I had known 28 years ago to not stress my joints, I wouldn't be as bad as I am today. And if I had known about the common co-morbid diseases, I would have gotten treatment for those sooner."

Let respondents answer

The questionnaire was designed not to push respondents into preconceived notions about their diagnostic odyssey. So rather than provide lists to choose from regarding misdiagnosis,

Disease	Sample Size	Years to Diagnosis Mean	Years to Diagnosis Median	Medical Tests Taken	Physicians Seen	Misdiagnosed	Delay in Treatment
Addison's Disease (Adrenal insufficiency)	15	3.1	1.0	6.6	2.9	33.3%	53.3%
Alzheimer's Disease (AD)	14	1.8	1.4	5.4	2.9	35.7%	57.1%
Amyotrophic Lateral Sclerosis (ALS)	16	1.3	0.9	10.3	4.7	43.8%	18.8%
Ankylosing Spondylitis (AS)	20	10.3	7.5	9.0	4.8	70.0%	40.0%
Anxiety	14	6.0	2.0	0.4	2.7	35.7%	57.1%
Aplastic Anemia (AA)	11	1.2	0.1	6.8	2.5	27.3%	54.5%
Asthma	15	9.3	3.0	2.9	2.7	26.7%	53.3%
Atypical Hemolytic Uremic Syndrome (aHUS)	12	0.1	0.1	4.8	5.9	33.3%	33.3%
Autism	27	4.7	3.6	7.7	7.0	51.9%	59.3%
Bipolar	22	7.9	3.8	3.5	5.6	72.7%	63.6%
Borderline Personality Disorder (BPD)	11	6.7	5.2	1.9	4.6	45.5%	72.7%
Cancer	134	0.9	0.3	4.4	3.3	41.0%	38.8%
Celiac Disease (CCD)	35	11.1	3.2	7.0	5.7	57.1%	57.1%
Cerebral Palsy (CP)	19	4.4	1.6	12.3	3.8	42.1%	36.8%
Chronic Inflammatory Demyelinating Polyneuropathy (CIDP)	19	2.8	1.2	10.7	5.5	52.6%	52.6%
Chronic obstructive pulmonary disease (COPD)	17	2.4	1.0	2.5	1.9	35.3%	29.4%
Crohn's Disease (CD)	82	3.4	1.3	6.8	3.5	58.5%	52.4%
Cystic Fibrosis (CF)	149	3.3	0.3	5.1	3.0	30.2%	27.5%
Depression (MDD)	19	10.4	8.0	2.8	3.5	42.1%	68.4%
Diabetes (DM)	161	1.7	1.0	3.8	2.0	29.8%	31.7%
Ehlers-Danlos Syndrome (EDS)	49	21.4	18.0	24.0	15.2	77.6%	71.4%
Eosinophilic Esophagitis (EOE)	27	2.8	1.8	4.9	3.3	48.1%	44.4%
Epilepsy	127	3.4	1.1	6.1	3.5	40.2%	43.3%
Fabry disease	18	16.0	15.0	3.2	3.6	50.0%	33.3%
Fibromyalgia (FM)	56	5.3	4.0	27.4	4.3	55.4%	69.6%
Gastroparesis (GP)	13	4.6	3.0	8.6	4.5	30.8%	61.5%
Hashimoto's Disease (HT)	16	5.6	4.0	8.7	3.3	43.8%	68.8%
Heart Disease	16	2.0	1.1	3.5	2.5	43.8%	37.5%
Hemophilia	134	4.7	0.0	3.4	2.5	17.2%	29.1%
Hidradenitis Suppurativa (HS)	12	7.8	5.5	4.8	6.8	91.7%	66.7%
High Blood Pressure (Hypertension, HBP)	16	2.5	1.1	2.6	1.7	12.5%	37.5%
HIV	26	4.6	1.0	5.0	6.1	26.9%	34.6%
Huntington's Disease (HD)	38	3.0	1.0	2.3	2.0	18.4%	34.2%
Hypothyroidism	17	2.9	1.1	3.3	2.3	35.3%	64.7%
Irritable Bowel Syndrome (IBS)	11	5.7	4.0	5.4	3.5	27.3%	45.5%
Kidney Disease	14	2.3	1.0	4.8	2.9	35.7%	21.4%
Lupus	57	6.3	2.6	10.2	5.0	50.9%	57.9%
Lennox Gastaut Syndrome (lGS)	27	9.2	5.0	19.3	5.5	40.7%	22.2%
Mastocytosis (Mast Cell Activating Disease, MCAD)	14	12.4	6.6	12.0	5.5	85.7%	71.4%
Mitochondrial Disease	10	7.8	4.0	13.7	8.5	70.0%	70.0%
Multiple Myeloma (MM)	15	0.8	0.4	5.3	2.4	33.3%	20.0%
Multiple Sclerosis (MS)	506	3.8	1.0	6.5	3.6	38.5%	41.7%
Muscular Dystrophy (MD)	26	3.8	1.2	5.1	4.1	30.8%	23.1%
Myasthenia Gravis (MG)	34	3.9	0.7	11.5	5.5	58.8%	55.9%
Myelodysplastic syndrome (MDS)	14	1.3	0.5	2.5	2.5	28.6%	14.3%
Narcolepsy	16	8.0	8.0	7.5	5.2	75.0%	62.5%
Parkinson's Disease (PD)	56	2.0	1.2	3.3	3.2	37.5%	37.5%
Paroxysmal Nocturnal Hemoglobinuria (PNH)	14	1.9	0.6	8.1	3.5	35.7%	28.6%
Pemphigus	16	1.2	0.5	5.3	4.8	68.8%	68.8%
Pompe Disease	12	10.8	7.0	7.5	4.6	50.0%	58.3%
Primary Immunodeficiency (PID)	22	11.8	5.5	12.2	12.0	63.6%	68.2%
Psoriasis Psoriatic Arthritis	23	6.4	2.2	8.6	3.9	52.2%	52.2%
Pulmonary Arterial Hypertension (PAH)	101	3.7	2.0	7.6	4.4	60.4%	56.4%
Rheumatoid Arthritis (RA)	42	2.7	1.8	6.3	3.1	38.1%	45.2%
Scleroderma	13	5.8	3.5	10.1	5.0	53.8%	46.2%
Sickle Cell Disease (SCD)	31	1.4	0.5	2.3	2.0	19.4%	25.8%
Sjogren's Syndrome (SjS, SS)	17	4.7	3.0	7.9	4.2	41.2%	52.9%
Spinal Muscular Atrophy (SMA)	45	3.7	0.6	3.6	2.8	33.3%	42.2%
Ulcerative Colitis (UC)	48	1.7	0.2	5.2	3.2	54.2%	45.8%
Von Willebrand Disease (VWD)	16	9.6	1.3	3.7	2.7	31.3%	50.0%
Waldenstrom's Macroglobulinemia (WM)	32	1.5	0.3	7.8	2.5	28.1%	21.9%
Total	3471	4.4	1.1	7.0	4.0	45.7%	47.3%

delays in treatment and reasons for the length of time it took to obtain diagnosis, we let respondents answer those in open-ended fashion. And did they ever! Two-thirds answered the open-ended questions, with an average of 42 words each. It totaled 9,147 open-ends. I read through them all and it felt like the equivalent of doing a thousand IDIs. Their voices came through loud and clear. And for many, they provided a scathing indictment of the medical establishment.

Key reasons cited for delayed diagnoses included:

Voice of the patient. Most often mentioned was that physicians weren't listening to the patient.

"They told me [the caregiver] it was impossible that her symptoms were occurring."

"[Faster diagnosis would have happened if] physicians [were] not making assumptions about my pain and symptoms and listening to what I had to say."

"I know doctors hate it when you come in and you've already diagnosed yourself but at least explore the possibility that this patient has put in time and is educated and knows their child better than the damn doctor."

"Doctors are only relying on test results and not listening to me as the patient."

Physician mind-set. Physicians weren't looking for the disease.

"No one wanted to see a zebra – they preferred to convince themselves and me that they were seeing a horse."

"I was repeatedly told that I didn't need to be tested for cancer because I was not, and never had been, a smoker."

"Doctors always thinking something is so rare no one can have it."

"They kept saying it was nothing, don't worry about it; was told it was just my depression and anxiety."

"Doctor was arrogant and assumed that I had diagnosed myself with scleroderma and he thought I was a fat, well off, non-working woman who had given herself an 'interesting' diagnosis."

"They are doctors and I always thought they were supposed to try to resolve my problems. Most never did and sent me away making me think I'm a hypochondriac."

Bias. Many patients felt there was bias against them due to their gender, race, weight or age.

"Women tend to get undertreated because doctors only half listen/don't take symptoms seriously, so I thought many of my symptoms were in my head – so I just didn't go to the doctor until symptoms were really bad."

"The medical professions overall need to blame everything on obesity as an easy answer."

"The times I received the most help was usually when I brought my white male partner. It was like he was more credible than the poor, black girl whining about something no one could see."

"I was a teenager when symptoms started and they kept blaming it on me being a teenager."

Insurance. Some believed insurance, or the lack of it, contributed to the lengthy diagnosis path.

"Insurance companies need to back off. A few instances, tests had to be explained and proven 'needed' before they would be covered. It is sad that insurance companies have a say in a patient's care."

"Insurance allowing her to see the correct specialist. We had to wait for a referral from her doctor to get that specialist which wouldn't have changed the disease however she would have been on drugs over two years before."

Location. Proximity to the appropriate facilities or specialists was to blame for some.

"I lived in a small rural town and there wasn't a doctor there that had experience with Crohn's disease."

"[We need] more advanced treatment in rural areas."

"[We need] a better more equipped medical facility in the smaller city I live by."

Getting to the correct specialist. For many it took a long time to get to a physician who was able to make the diagnosis.

"My physician and first two neurologists were either unaware of or unfamiliar with the disease."

"Pediatric neurologists should not be afraid or hesitate to refer patients and their families on to a specialist (such as the epileptologist) in cases such as LGS."

"It's important to realize that primary care physicians do not have the knowledge or skill to diagnose or treat specific diseases."

Medical education. Many mentioned that rare diseases aren't taught sufficiently in medical school.

"[We need] better information in medical books, currently just two lines in a textbook [about Behcet's disease]."

"Teaching physicians that there is more beyond the 70% that fit into what they learned in medical school, to look and research options when someone doesn't fit the norm."

"I believe time spent in med school covering these rare diseases is less than a day and future doctors are taught to look for the obvious, not the rare...The horse, not the zebra."

State of medical knowledge. In some cases, the blame was placed on the deficient knowledge of the disease at the time.

"The first two patients discovered to have this syndrome didn't happen until 2012 so I don't think we could have been diagnosed properly in 2007."

"There were no doctors that knew what celiac was in 1992."

"In the '80s things were just not like they are now. We didn't have access to the genetic testing like we do now."

Delay or denial on the patient's part. Some patients feel they played a part in the slow diagnosis.

"I didn't want to do a colonoscopy."

"I figured I could get over it on my own."

"It was my failure/procrastination to officially be tested."

"Chose not to tell anyone for 25 years as I would not get jobs or insurance."

"My husband hates doctors and is not always completely honest when responding to their questions."

Words of advice

The respondents provided words of advice for everyone involved in the health care process as well.

Patients

"Make suggestions when you see your primary physician!"

"You know your body. Don't take no for an answer. Be your own advocate."

Physicians

"Please, listen to your patients. They know when something is not right with their body."

Medical education

"More time needs to be spent training physicians on rare diseases."

Patient advocacy organizations

"Raising awareness among physicians and the general public can help put your disease on the map, making sure physicians and patients consider it may be the cause of their symptoms."

Apply learnings

Perhaps artificial intelligence diagnostic systems, such as Watson, can also extend the ability of physicians to incorporate all the symptoms and test results and apply learnings from the 7,000 rare diseases to properly diagnose much more rapidly than these patients have experienced. As their comments show, no matter which part of the health care system is involved, there is much work to be done to better consider, incorporate and act on their viewpoints.

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••• health care research

Breaking the mold

Using research to understand health care routines

| By Kathryn Ambroze

snapshot

The author looks at the roles of cues and heuristics in affecting patients' and doctors' habits and responses.

A simple morning routine – get out of bed, get dressed, make some coffee – is a daily experience that becomes so repetitive that it doesn't even require direct deliberation. These experiences grow into a repeated behavior that inevitably feels automatic. These habits are embedded in our daily lives, impacted by our environments and enhanced by repetition. Exploration of this continuous loop of cues, routines and rewards can be implemented in various fields, including pharmaceuticals.

Each brain is a map of an individual's experiences that, through neuroplasticity, is adapting throughout one's life. These constant adaptations in the brain are creating neural networks, or pathways, which quickly communicate and respond to environmental cues (Berkman, 2018). The habit loops of cues, routines and rewards are then either strengthened or weakened based on how frequently the same pathways need to occur. Doing so allows the brain to conserve energy for common actions. Consider a new driver's experience the first time behind the wheel of a car. The amount of awareness required to understand the space of the vehicle and how it moves on the road can be overwhelming. Yet over time, driving becomes nearly automatic to the point where the driver no longer has to consciously focus on the task due to the frequency of driving overall. With a routine experience, the neural networks create stronger connections that require less energy to fire messages.

In the same way, physicians who see patients with the same profile have created heuristics, mental shortcuts, to their prescribing plan. Heuristics allow individuals to simplify complex ideas by breaking them down into smaller, more digestible topics (Kahneman, 2011). A target question could ask how a prescription drug will improve the general population's health per dollar spent, while a heuristic question approaches the topic by reflecting on how a doctor feels when a sick patient can't afford medicine.

If there is a recurring cue resulting in a reward, that overall routine is referred to as a habit loop. The cue causes an automatic response to encourage the following behavior associated with the cue due to the expectation of the reward. The release of the neurotransmitter dopamine in the brain activates the reward system, furthering motivation to pursue the

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same actions again. The gratification of the dopamine release is what motivates a repeated action which eventually evolves into a habit (Berkman, 2018). The brain, however, is not able to label a habit as good, bad or indifferent. Yet, through awareness, we can find mastery in developing positive habits to achieve higher order benefits.

Products themselves can be incorporated into habitual routines, such as taking a medication right before brushing your teeth. Furthermore, brand loyalty is a byproduct of habits in prescribing and patient compliance. Physician and patient satisfaction are supported through meeting or surpassing the expectation of the benefit, or reward, of a product. By analyzing a product's positioning against competitors or evaluating certain key attributes that are anticipated to be associated with the product, the company can improve its strategy to fit the expectations of its audience and, ultimately, encourage prescribing loyalty.

Detect strength of biases

To understand the respondent expectations, psychological tools such as implicit response detect the strength of mental biases of our automatic associations among various attributes and stimuli. Understanding the participant's semantic network through reaction time provides underlying associations between concepts such as brands and attributes. Furthermore, the implicit tests tease apart the multiple concepts being tested through the strength of each association. For example, a physician can have a very strong association between Product X and efficacy but a weak association with longevity, whereas Product Z is highly associated with longevity and efficacy.

Need gaps emerge by exploring the expectations or drivers of the audience when compared to perceptions of the company. Implicit tests either reaffirm that the product is meeting the need of the physician or provides areas of innovation to expand. The opportunity to transform and improve the positioning and messaging allows the company to differentiate among competitors. Physicians seek out credibility in health care, with an emphasis on relevancy and success. Outdated messaging can detract, especially if the product is not something of peak interest. Employing any form of an implicit test will provide deeper insights into how the product or stimuli is positioned to the audience.

Minimize risk

Biases of a company may hinder potential growth. These assumptions are often known as anchors since it is a reference point. Consumers, including physicians or patients, base a lot of their expectations and decisions about a product on a comparison of another similar reference. Humans use anchoring as a method to minimize risk; however, it can be misleading if the reference point is incorrect (Wong and Kodagoda, 2016).

Did you ever have to estimate how many jelly beans were in a jar? Using your hand to scale the jar and then measure the number of jelly beans that could fit on your hand is a way to strategize an educated guess. However, if you over- or underestimate the anchor, the number of jelly beans will sequentially be incorrect. Similarly, if a physician assumes a pharmaceutical drug is less effective than the competition, there is an opportunity to modify how it is framed to better understand the comparison data. Through evaluating perceptions of products and companies, we can better understand both what the current anchors are and how to improve the anchor environment to better align with the company objectives or fulfill a strategic communication opportunity.

To improve the way that the target audience interprets a product, breaking anchors will help develop a closer connection between the audience and the product. Reinforcing a cue is possible whenever an opportunity arises for the product to be evaluated. By creating an authentic frame of reference, such as medicine packaging emphasizing the lungs to suggest cough relief, the reliability of the brand is strengthened. Through the establishment of a cohesive messaging, the branding can reinforce the intended cues.

Brand harmony involves analyzing communication, sensory input and experiences to promote a unified message. Linking each component of a brand portfolio, from first ad exposure to product experience, should be intentionally consistent. Be critical of the nonverbal and explicit information extracted from the brand profile to ensure that the subliminal experience is matching the outward messaging. Developing a consistent, multilevel integrated design minimizes potential confusion or disruption that could deter the target audience.

More appealing

The phrasing of a prompt or message is a crucial component that can alter how it is interpreted and, furthermore, reacted to. By shifting phrasing or messaging to hint at the rewards of a habit loop, it may entice target audiences to find an experience more appealing. The affect heuristic, or the way that emotional shortcuts influence decisions, can be impacted by perceived risk (Wu, Zeng and Wu, 2018). For example, learning about potential outcomes of a product may induce a sense of fear which in turn increases the perceived estimated risk. By homing in on the emotional experience of a situation, a designed approach catered to sharing information that focuses on rewards can increase engagement. Emotional scales, such as the self-assessment manikin (SAM), are examples of how to determine the intensity of the pleasure, arousal, dominance (PAD) emotional states model. By combining behavioral economics tactics with emotional scales, insights can be given into how an experience resonates with the audience.

System-thinking classifications are ingrained into the way that market research approaches studies. Analyzing the instinctive and unconscious (System 1) or rational and deliberate (System 2) components of human decision-making is helpful in developing a productive communication (Kahneman, 2011). The perception of marketing messages or product experiences can be measured through psycho-physiological, traditional or psychological testing. During surveys or interviews, physicians and patients can provide a conscious opinion of a product or experience.

In addition to the System 1 and System 2 processes, a third component is emerging, referred to as System 3, which can promote innovation and ideal concepts. As a future-facing methodology, System 3 considers projections on how a product or service can improve to meet the direct needs of the consumer (Baumeister, Maranges and Sjåstad, 2018). During the use of System 3, consumers are asked to predict how either a specific industry, competitor or product will evolve. Investigating how physicians or consumers predict changes to medical practices or the health care industry can provide insight into the expected roles of pharmaceutical companies. Provoking exploration through imagination also motivates the patient or physician to prioritize what would be most advantageous.

Using sensitive psycho-physiological measures in communication research, such as facial electromyography for emotional valences or heartrate variability for cognition, can uncover in-depth analysis of the emotional experience. There is an advantage of recording involuntary reactions to an experience while utilizing psycho-physiological tools. These measures provide unbiased outputs that can be analyzed to determine how the communication is affecting the respondent on a deeper level.

The use of eye-tracking can also provide meaningful outputs as a means of measuring visual attention. Exploring what a participant views while exposed to brand communication allows the researchers to conduct quantitative analysis of gaze behavior. Eye-tracking demonstrates if, upon first exposure, certain components of a concept are being ignored or emphasized by the consumer. The campaigns may not be perceived as intended because the consumers are not focusing on areas of interest. Eye-tracking can expose what drives focus and ultimately allow the researchers to optimize the visual landscape of stimuli.

Better articulate their messaging

Taking advantage of various research methods, from something as simple as a survey to as in-depth as psycho-physiological testing, can provide both a stronger appreciation for and wider context about the best type of design to achieve company objectives, as well as high-order benefits. Through the process of exploration and innovation, companies will be able to better articulate their messaging to consumers. Shaping the communication strategies through the manipulation of cues, routines and rewards can provide strong groundwork to encourage informed decision-making. Promoting an overall positive experience for the consumer can help link experience with expectation through a rational, effective and consistent design to ultimately increase engagement.

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••• health care research

Help us help them

How research firms can participate in patient-physician support programs

| By Amr Mansour

snapshot

Amr Mansour outlines how the capabilities of health care market research agencies dovetail with the requirements of patient-physician support programs.

A PPSP is a patient-physician support program, typically designed by any concerned organization for the welfare of patients and mostly by pharmaceutical companies to give back to their communities. Although variations exist, there are three main types of PPSP: on-site patient early screening for disease programs (and optional call-center follow-ups); patient affordability programs (through call centers and medicine distributors); and patient education programs (also with optional call center follow-up).

Why do PPSPs exist? Three main reasons.

Screening. PPSPs help in early diagnosis of disease in at-risk patient populations and raise the awareness for early detection. The proactive screening provides patients with a better chance to treat themselves when they catch their condition early. Also, not all physicians are equipped with the latest and sometimes quite expensive detection devices. In addition, assessments are augmented by medically approved disease-specific questionnaires to determine more about the patient's journey in his/her disease. The tools, equipment and personnel are provided free of charge to support patients and their treating physicians.

Affordability. PPSPs help to provide a channel to reduce costs and increase accessibility to costly drugs through sponsored programs where patients are assisted to help in the cost of medications.

Education. PPSPs help busy physicians provide patient educators, who give time explaining the dos and don'ts of lifestyle choices and coping strategies for the patient, who is searching for answers and support. The patient educators are sponsored and no fees are levied on either patient or physician.

Need was created

Traditionally, the PPSPs were always provided in-house by the pharmaceutical companies sponsoring them. However, with the advent of stricter compliance guidelines removing the pharmaceutical company from any type of direct communication or contact with the patient, a need for third-party vendors was created. The vendors are not allowed to send any identifiable

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patient information and provide a barrier to prevent any influence from the pharmaceutical company.

Why are health care marketing research now getting involved? In the ecosystem of pharmaceutical companies' vendors, specialized health care research agencies are a close partner to reach for, both for their specialized knowledge, personnel and relationship and also for the fact that the capabilities needed – fieldwork and call centers coupled with data analysis and reporting – are typically part of a health care market research agency's offerings.

What synergies are there with market research? There is a lot of scope in collecting anonymous aggregated data that can be used to determine how much impact on the welfare of the community the sponsor company is achieving and how it may improve. Furthermore, PPSPs give agencies more exposure to patient populations and physicians, understanding their main respondents better. Moreover, a deeper understanding of disease and therapy areas is acquired through the course of PPSPs, equipping agencies to approach their market research projects with more expertise.

Not easy

PPSPs are not easy. They require a huge investment in infrastructure, technology, training and personnel and are heavily regulated with regular compliance audits.

The must-haves include zero tolerance to any delay in adverse-event reporting, 100% proper documentation of all source documents and timely and accurate reconciliation. In addition, refresher trainings are not to be missed and updates to the program are periodically needed to be taken onboard rapidly and assimilated for immediate implementation. Furthermore, dealing with patients and physicians in this type of setting requires a special skill set, with good decision-making while in the field or on the phone, sticking closely to the policies, guidelines and pre-approved scripts and scenarios.

Additional requirements include: a laborious and iterative program for design and approval of every minute detail, sometimes taking months or even up to a full year – nothing is taken for granted or left to chance. Afterwards, the program cycle would typically include the main events of interactions, either with the health care professional or the patient, each of which needs to be documented and logged in an interaction, whether it be verbal, written, by e-mail or hard copy, SMS or call. The reporting is rigorous and is only for the very analytical and detail-oriented – reporting is daily, weekly and monthly. Internal quality checks are conducted by the agency on its own operations daily/weekly and sponsor-company quality checks are performed at least monthly – with every six months to a year a full scale. There can also be week-long external audits from the compliance departments of the sponsoring company for things like confidentiality, document retention, access control and archiving as well as on-site inspections of infrastructure for things like flood- and fireproof storage, backups, disaster recovery procedures, business continuity policies and procedures.

If all of the above sounds like a lot of work, it certainly is. But the rewards are immense for the research agency, client and community, in spite of all the effort and cost involved.

The community is served by better access to medicines, diagnosis and information. Awareness campaigns are conducted through the life of the program which alert patients to silent or dormant diseases that enable them to have a better chance of quality of life and treatment when dealt with early. One such famous awareness campaign was Amgen's 2019 "Break Records Not Bones," which won the Guinness World Record for most osteoporosis screenings in one day across nine countries – a huge number of people were assisted and made aware of osteoporosis and its early detection.

A big indicator of the value and commitment of these programs (also additionally to the agency) is how long-term they are. A typical program will run into an average of seven years at least.

There are many other high-profile programs such as screening for retinal diseases by temporarily stationing at hospitals and medical centers with mobile equipment that is staffed by trained professionals to combat blindness and help in early detection. Or removing the guesstimates of whether someone has diabetes or is pre-diabetic/metabolic syndrome by having mobile units with the highly accurate HbA1c glycated hemoglobin tests, as well as weight scales and tape measures for waist circumference, also placed where normally these tests would not be available. Yet another would be accessing remote and hard-to-reach areas with low-weight spirometry devices to measure lung efficiency thereby providing access to patients who would otherwise suffer before detecting chronic obstructive pulmonary disease or asthma.

Many more types exist and variations abound on how client sponsors are proactively seeking to bear their corporate social responsibility and care for the community.

The client is served by contributing back to the society, whether through providing lower-cost access to its medications, screening for early treatment or educating patients how better to deal with their condition.

The research agency is served in that it is exposed to deeper understanding of therapy areas, patient populations and physicians as well as touching the lives of those that health care marketing research agencies ultimately serve through their studies and reports. After all, ensuring everyone has proper diagnosis, access and information to be treated is why most of us are in the health care business.

Lives a deeper purpose

Patient-physician support programs are an integral complement to the health care system. Cost, information and early detection have always been on the forefront of all health care stakeholders. With the advent of more stringent guidelines on distancing away from direct contact from the patient and physician, pharmaceutical companies have turned to third parties that can implement strictly confidential and privacy-maintained programs. The natural vendor in the ecosystem of the pharmaceutical companies is the health care market research agency, which deals naturally with fieldwork, call centers, data analysis and reporting. Although synergies exist, PPSPs further require a huge commitment on behalf of the agency to maintain an operationally excellent and compliant program. Ultimately, not only does the sponsoring company give back to the community and the agency lives a deeper purpose but the patient population is the biggest beneficiary with additional support from the physicians in whose care they are or will be.

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••• health care research

Don't be afraid to spice things up

Why adding a little personality could help your MR career

| By Bj Kirschner

snapshot

From the Naysayer to the Prankster, Bj Kirschner looks at five personality types and the value they can bring to conducting research.

Whether you are new to market research or a lifer, you will notice two topics that dominate trade articles, online discussions and conferences: technology and communication. How will the first affect our business and how will the second deal with those changes?

Beats the heck out of me. If I knew what technologies were going to appear on the distant horizon, I would be long-retired, the winner of multiple lotteries. If I could link generations together by exposing common communication habits, I would be too busy accepting my Nobel Prize to chair your International Olympic Committee.

In danger of getting crushed between the 21st century's Scylla and Charybdis is an element extremely and specifically important to health care market research: personality.

Health care market research, and really health care in general, starts with the vague "Is that person in need of help?" and ends with the triumphant "Here is how that person can be helped!" In between and alongside clinical research come years of science, tests, questions and answers, approvals and setbacks. All of that takes a lot of people, and though robo-calls, dials, surveys and eye-tracking can be helpful too, there is no substitute for the person who first asks the questions or the person who at last delivers the answer.

What we are losing are the bonds not only between us on the research side but also those with the respondents and their handlers. The personal touch and unique thinking are getting lost to things like repetition, speed and volume to such a degree that training and retraining are based on sets of rules rather than areas of concentration, rote rather than wrote.

Health care market research itself may not save lives, but the information that comes from it, if used and understood correctly, certainly can help. My clients at pharmaceutical companies certainly think so. The research companies I work with feel the same, as do the suppliers who dig and find the supporting data. Most of all, our beloved respondents remind us of it on a daily basis.

How do we train and retrain ourselves to have personality? Isn't it genetic? Partially, but like anything, it can be honed and polished. To prove it, and because we in health care

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market research love to overcomplicate situations, I will pick five personality traits most of the world considers negative and show why they can be helpful in saving our individuality and are worth consideration in the larger scope of how we all do business.

The Know-It-All

Ugh, the know-it-all. She's the one who always has an answer and makes sure you know it. Don't you hate being in a brainstorming session with her when she starts rattling off findings from similar studies she has done over the past 15 years?

Wait…how many years?

Forget the delivery, focus on the fact that she can remember studies she did 15 year ago (your CEO was in college 15 years ago). Do you know how many studies that counts? Hundreds! With thousands of respondents! She is your company's Wikipedia page. She knows health care market research so well and is so valuable that she's been in her position for 15 years. That's the amazing part. Seek her out, pick her brain, use her knowledge. That's what it's there for. The more you engage her, the less she will have to address the troops in long meetings. The sheer knowledge in this industry should stun you. We can talk about facial fillers and foot ulcers at the same time. Everyone should lean on that knowledge, whether you are a biotech company or caregiver with questions. A know-it-all is the link between the questions and answers, so new employees should spend a day with her and seasoned employees should not fear her replies.

Keep in mind that for most of health care market research's existence, the know-it-all was a respondent whose name had "Dr." in front of it. Only physicians could give us info. Well, at least until we learned that nurses could help. Oh, and payers. Wait, patients too! And don't forget all of us on the inside. Now the expert is anybody with the right knowledge to fit the research needs.

We should all make it a goal to be a know-it-all. The harm is not that the brainstorming bore shares too much, but that we ask her too little.

The Naysayer

Even in health care market research, it is okay to say no. Sure, sure, we all know we can say no, but I wonder if 10 of us actually did so in the past week. To my friends at research agencies, when your client asked you to run a mobile app study with 100 patients suffering from a very rare neurological condition in the U.S., Brazil, Japan and Finland, you did say no to Finland, didn't you? And it was a qualified no, something along the lines of: "There are only 70 known cases of this condition in Finland and since the patients have very little manual dexterity, both the quota and the methodology are not possible there but let me see what will work," right? Of course it was. And what was the response? "You are always so gloomy. Nevermind, I'll find someone else who wants my business without any pushback." And then how many hours later did you get an e-mail asking if it was too late for you to consult with your folks in Finland?

"No" is a healthy response. It's honest. Not everything is possible. I would not recommend just saying no without any qualification but no is okay. "No" affects lives. Anyone ever worked with cystic fibrosis (CF) patients? You know a day in a central location could be a death trap for patients given the type of hygiene required to deal with multiple patients in the same space. You have told a client who is new to the CF landscape that his scenario is not possible but have also presented options that will end in the same results. You said no as proof of your deep experience, you helped someone learn something and the research was a success without harm to anyone.

Okay, it may not look great on a bumper sticker, but "Just say no, because…" is worth remembering.

The Prankster

A sense of humor may not seem like a negative trait we embody but only because it shows up so rarely. Because our side of the industry often deals with terrible debilitating conditions, no moderator walks into a focus group room and howls, "Who wants to talk wet AMD-e-e-e-," like the one a few doors down showing off a new line of glow-in-the-dark running shoes. Ask your CPG colleagues; I bet they tell you they are afraid of how serious we are, which is why a dose of humor is often an unexpected shock.

This is the personality trait I most embody and I feel it's an asset. I have a wry sense of humor, I'm good with a quip and I'm still here after 27 years. Not every situation calls for a quip but we often seem so fearsome and angry that I cannot resist regrounding us.

I had a client once who could not get an affiliate to approve the translation of a discussion guide for so long that we were ready to yank the study, to waste all that money and hard work because one person in the process was gumming up the works. At a moment of intense frustration involving three different companies on a conference call, I remarked, "He's not approving the German translation, the patients don't speak English, so why don't we use sock puppets?" The end-client was on the line! Did my mouth just buy me a whole bunch of trouble again?

First thing the next day, an e-mail from my client arrives. I start packing up my desk and drafting an "I'm going to miss you guys" letter as I read the missive from this man who considers a smile to be the eighth deadly sin: "Though we still do not have approval on the translated guide, consider this the green light to start recruiting. The German affiliate has asked that all socks used during the interviews have no logos on them to avoid accidental bias. Please make sure I receive updates by 4pm daily."

Of course, now I take full credit for a jest changing the direction of the project but really all it did was break the tension and remind everybody involved that there was a larger picture here (and saw my client show a hint of humor). Life-and-death topics do not require life-and-death daily outlooks. I have not been forgotten by that client.

No, you cannot borrow the sock puppets. Make your own; it's fun for the whole family.

The Modernist

I'm not talking about Millennials thinking in 150-word bursts, as the modernist isn't necessarily a technocrat. The modernist is that guy who always has input when you have a problem, usually without being asked. He's really good in HR exercises because bosses always love hearing something quirky, even if it's complete hogwash, because at least someone is paying attention.

I wish more people working in health care market research had the opportunity to spend time in a phone room. I started in one. Couldn't wait to get out of it but those rooms are cauldrons of idea generation. In these rooms are people tasked with the hardest job in our entire industry: finding and convincing people to participate. The sit-downs among recruiters and supervisors to make that convincing faster and easier can be mind-numbing, especially when a modernist is the only one speaking. But even if a modernist is 99% hot air, his other 1% can be golden. It's the modernist recruiters who have come up with things like going online to find patient support groups, using the male side of a data base for a female-only recruit because a lot of guys are married to a lot of women who aren't in the database and paying an office manager to give patients a flyer during a visit to the doctor.

All of these ideas were considered batty when they were first proposed. Think of the extra time it will take! The extra money! The end client will never allow it!

Now they are the first lines of attack in a difficult recruit. They have replaced many other first lines of attack and hopefully someday they too will be replaced because some modernist thought of something years ago the rest of us are just now beginning to understand.

It's called "market research," so shouldn't "research" be welcome anywhere in the process?

The Realist

Those of us in this industry more than five minutes have heard, "You're only as good as your last project," a realist rallying cry that makes realists less popular than high school math teachers and puppy kickers. But, they are the most vital to what we do. There is at least one on the pharma team picking countries, another at the research agency designing the study and a few at the field agency and recruiting operations. Oh, and every single respondent is a realist.

That's right. Every single respondent is a realist. They are all capable of terminating on a screener as proof that either they do not fit or that the screener is flawed. They are all capable of canceling appointments due to personal illness or just being busy. They are all capable of dousing the fire of inspiration by disliking a concept or picking the ad you least expected to use. We need honest feedback from respondents or else everything we do is pointless.

So if the most important people in the health care market research chain are giving it to us straight, shouldn't we be doing the same at every step of the process? Realism itself is not negative; it's simply being able to assess a situation from a 360-degree vantage point.

The realist is the person who came up with the fair market value incentive calculation as well as the field manager who can explain why it's not enough. The realist is the moderator who wants to make the last evening flight out in order to be in fighting form the next day as well as the project manager who says that evening times are the most popular in the specific city being used. None of these people are right and none are wrong but you cannot convince them of that until a solution presents itself.

Convincing a person to change his or her mind is tough and those who can do it are brimming with personality that should be encouraged rather than squelched.

Am I suggesting we all should be negative and depressing? Of course not. My point is we all have traits that make us unique – traits that cannot be seen on recruiting updates or Excel files full of data. Why not play to your strengths so that you are more than a recruiting update or a file full of data to your colleagues and clients?

I could have done this article with five peppy personality points but my personality rarely allows me to opt for the straightforward and that is exactly my point. I'm a know-it-all naysayer prankster realist with a splash of modernist who my clients and partners seek out for feasibility checks, for facts and figures and for experience, despite knowing they are going to get novel-length ponderous answers with bullet points of pros and cons and at least one joke to keep them awake.

Turn them into strengths

Here is the challenge I set for you, or hopefully you set for yourself: Look at how you work on a daily basis, at the habits or lines of thought you use that may not be obvious to those around you, to your clients – even to respondents – and make them obvious. Turn them into strengths associated with your name that will keep you top-of-mind as an integral force in an industry with high standards and high risks.

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••• cx research

Forewarned is forearmed

Predicting (and preventing) failure in CX tracking studies with FMEA

| By John Garza

snapshot

John Garza writes about using failure mode and effects analysis to test your tracking study.

Failure mode and effects analysis (FMEA) is an ominous-sounding name for a tool that is actually quite simple and profoundly useful in identifying risk areas in any business process. In short, with FMEA we identify all of the possible ways a process can break, the likelihood of them occurring, the potential impact of these breakages and our ability to detect them or even prevent them from happening in the first place.

In this article, we are demonstrating FMEA in a market research context – specifically, for use within tracking study survey processes. That said, the FMEA approach described here can benefit almost any business process, in market research and beyond.

Many daily checks

We had been managing a long-running survey-based B2C customer experience tracking study for one of our clients. From an overall technical program perspective, all was running smoothly, as we had had in place many daily checks in our process (both automated and otherwise). These checks looked for any issues around e-mail invitation delivery and survey programming, for example.

We eventually noticed that there had been a marked shift in the proportion of mobile completes in the quarter. For some time, we knew that the proportion of mobile survey takers was steadily on the rise (keeping in line with the global increase of mobile users). However, we realized that in recent months the rate of mobile completes on our survey program had accelerated beyond expectations. This was important as mobile respondents on this program tend to give lower customer experience scores than do desktop respondents. Furthermore, our client had set customer experience growth targets for the year within their organization, in part based on an expectation of mobile survey respondents. And now those targets had to be readdressed.

Clearly, it would have been better for us to have caught this for our client immediately versus one to two months after this marked shift in proportion of mobile surveys. In doing

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Figure 1: FMEA for Surveys

Purpose: Identify all possible issues that could occur in a process, including risk and severity. Optimize process to prevent issues.

Follow this process typically in the design phase of a process. However, FMEA can be done at any point, even after process launch.

			A	B	C	
Process Function	**Measurement**	**Potential Cause(s)/Mechanism(s) of Failure**	**Severity** Rate 1-10 (10=Most severe)	**Probability of Occurrence** Rate 1-10 (10=Highest probability)	**Detection Risk** Rate 1-10 (10=*Lowest* probability of detecting)	**RPN** (A x B x C)
Survey	Unexpected change in **Overall Satisfaction score**	Change in invitation process or programming issue	9	2	8	144
Survey	Unexpected decrease in **% response rate**	Problem with survey invitation scheduler	10	5	9	450
Survey	Unexpected change in total **survey volume**	Issue with survey slowness/programming issue	8	2	9	144
Survey	Unexpected change in **survey length**	Issue with survey slowness/programming issue	7	2	7	98
Survey	Unexpected change in **% mobile vs. desktop**	Change in invitation process, sample file or programming	6	2	5	60
Survey	Unexpected change in **demographic mix**	Change in invitation process, sample file or programming	6	2	5	60
Survey	Unexpected change in **% survey abandons**	Change in invitation process or programming issue	5	4	4	80

so, we would have helped our client by giving them a bit more time to manage internal communications and planning, while we contributed to this process with analytical deep-dives and best practices. In the end, our client was very gracious and understood that this real-world shift in mobile usage was unavoidable and to a large degree unpredictable. But at the same time, we realized that as trusted partners and advisors we needed to augment our survey monitoring and that FMEA was the right tool for the job.

Used across many industries

The FMEA procedure was developed in the 1950s by the U.S. military but was later used by NASA in the Apollo, Viking and Voyager space programs, just to name a few. The civil aviation industry followed suit, along with automotive giants such as Toyota, DaimlerChrysler, General Motors and the Ford Motor Company. Today, FMEA is widely used across many industries.1 It is also in the standard toolkit for various quality-related disciplines, such as TQM and Six Sigma.

One of the fundamental questions FMEA asks is, "What could possibly go wrong?" In answering this question we are able to account for almost any conceivable problem before it rears its ugly head. We can then improve our processes and prevent these issues from happening. Or at the very least, we can establish steps to detect these issues as soon as they happen.

Additionally, FMEA can be expanded to measure not just when a process clearly breaks but when something in the process might possibly be broken.

In this example using a survey process, we are allowing FMEA to alert us to changes in our survey's output. These changes in output may indicate that something is wrong.

As we mentioned earlier, FMEA is a very straightforward process. As shown in Figure 1, here are the steps:

Measurement: First, list all of the things you want to inspect as possible areas of concern. Using FMEA nomenclature, these are called "failure modes." However, as we said earlier, we can also list those things that point to possible failure modes.

Potential cause(s)/mechanism(s) of failure: Describe the possible cause of the failure. For survey-related failure modes, often the causes are tied to programming issues, e-mail invitation scheduling issues or sample file issues. There may be more depending on the program.

Severity: Using a 1-10 scale, where 10 is the highest level of severity, rate the potential impact of an issue occurring.

Probability of occurrence: Using a 1-10 scale, where 10 is the highest probability of occurrence, quantify the chance that an issue in that particular area may occur.

Detection risk: Using a 1-10 scale, where 10 is the lowest probability of detection, quantify the chance that you will be able to catch an issue in that particular area any time it occurs.

RPN: Calculate the risk priority number (RPN). RPN is a simple multiplication of the severity by the probability of occurrence by the detection risk. The RPN will help you see where your process is the most vulnerable. Use the RPN to prioritize where and how marginal resources are allocated to improve your process.

You'll notice that many of these steps ask for quantification of an element in your process. In some cases, this quantification will need to be your best guess. This is alright – as long as this best guess is an educated one, made by those familiar with the process, subjectivity should not be an issue. It is better to have a structured monitoring approach with some subjectivity than no monitoring approach at all.

Prioritized for review

You may already be able to see the benefits of applying FMEA to a process. Now that you have calculated RPN across all pertinent areas in your tracking study process, any area with a higher RPN should be prioritized for review. We should then ask ourselves the following questions: What process improvements can we make in order to prevent this issue from happening? What can we do to detect this issue immediately if and when it does happen?

Obviously, prevention is an ideal solution to any potential problem. Where prevention is impossible or unrealistic, detection is the next best thing. In a survey process, quickly identifying unexpected fluctuations in survey scores, response rates, demographic mix, etc. will allow your team to investigate and either take remedial action where necessary or explain it away as normal variation. The situation we want to avoid is one where we identify an issue farther downstream when it is too late!

Changed immensely

Survey-based tracking studies have been around a long time but have also changed immensely over that same time period. Where once paper and telephone surveys were common, online surveys took over as the preferred data collection methodology. Online surveys further include complexities such as varying device types and varying invitation and survey delivery methods. Your survey program may even be multimode, using a combination of data collection methodologies.

Changes in the technologies used for data collection will require you to revisit your FMEA design frequently, in order to ensure it is as all-encompassing as possible. More holistically, as the design of your survey changes over time, you will want to ensure that you have reviewed your survey process FMEA and have addressed necessary adjustments there as well. Revisit your FMEA design at least each quarter and see if any adjustments need to be made to it.

Lastly, some other thoughts on FMEA that we have found to be helpful:

- Start now! FMEA can be implemented on any process, however long it has been running. It is never too late to start improving your quality processes.

- FMEA is best when used on new processes, both during and after the design phase. Using a garbage-in, garbage-out mentality, introducing FMEA early on will only ensure that you are executing a process with the highest possible quality output.

- Reward participation and improvement! A quality process such as FMEA may be perceived as "extra work" by some, especially if you introduce FMEA onto a long-running survey process. Get buy-in by talking up FMEA's benefits to your staff (less re-work, less stress, etc.) but also by rewarding improvements in process quality. Track your quality by using metrics such as the number of days between failures/issues or the average failures/issues per quarter and reward that improvement.

Practicality and simplicity

FMEA has been a very valuable tool for quality professionals for decades. While it has been very popular in more technical industries, our use of FMEA does not need to be limited to those industries. Its practicality and simplicity allow us to easily appropriate FMEA into our researcher toolkit. In doing so, we will be able to improve our survey processes, shielding ourselves from quality risk and other unwanted surprises. The time we save on avoiding re-work can thus be redirected to other value-adding tasks, which is the best possible situation for both researchers and our clients.

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Giving shape to the future

How to build a framework that brings trends to life

| By Tim Kenyon

snapshot

Trends come in many forms and sizes. To make sense of them, the author argues, you need a structured approach.

Identifying consumer trends before they reach critical mass is a challenge – part art and part science. Today's consumers are more confident, demanding and dynamic; their world moves at unprecedented speeds and their relationships with brands are constantly evolving.

When we do find that new, emerging movement – one that illuminates untapped consumer needs and desires – we may have the beginnings of a great new product line or an award-winning ad campaign. But unearthing a trend is truly just half the battle; unless our story speaks to leaders throughout the organization, this great new discovery may never grow up to be anything but a theory – a great notion that ultimately leads nowhere.

To become truly impactful, trends need structure and context. One trend, discovered and presented in isolation, is not nearly as convincing as a "family" – a series of interconnected trends, possibly based on different sources, that holistically describe all the issues impacting consumers.

Take the automotive industry. Multiple trends are impacting this crucial sector – from automation and technology to environmental regulations, to shifting attitudes towards car ownership and even changes in urban planning. Having watched these trends taking shape and knowing how they might interact, the most successful automotive companies now see themselves in the business of mobility (moving people) not just "selling cars." They recognized the signals that were whispering that change is coming and they are now adapting to how people want to travel, today and in the future.

Over the past decade, many successful companies have been able to recognize trends before they hit critical mass – like the rise of environmental concern and eco-citizenship, which brought us success stories such as Tesla or TerraCycle. Millennials are leading the way in prioritizing experience over possessions – embracing immersive virtual reality or the growing interest in global travel. And we all know about the fast-rising demand for

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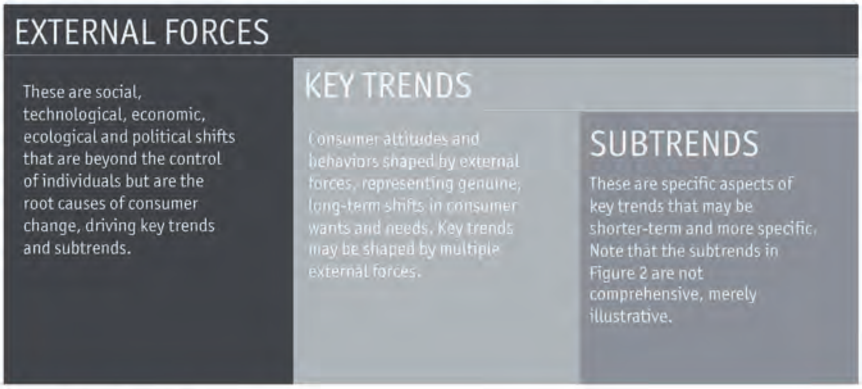
Go Deeper
With Every
Participant

Figure 1: Analysis Framework

Trends are examined at three levels, beginning with external forces that drive consumer macro-trends and subtrends.



GfK Consumer Life Global 2019 TrendKey

Figure 2: 5 STEEP Forces That Impact Consumer Behavior

Social, technological, economic, ecological and political shifts that are beyond individuals' control but are root causes of consumer change*

Social	Age structure	Population flows	Diversity	Education
Technological	Tech democratization	Tech advancements		
Economic	Globalization	Income distribution	E-commerce	
Ecological	Resource scarcity	Food, air & water safety	Climate change	
Political	Political volatility	Government regulation		

* Note: This is not a comprehensive list of forces, merely the ones most relevant for this example.
GfK Consumer Life Global 2019 TrendKey

instant access to goods and services which has powered juggernauts like Amazon and Netflix. All of these dramatic shifts began as subtle inclinations, barely visible to researchers or the marketplace.

But gaining a rich perspective, and marketplace advantage, takes more than just one or two interesting trends. The goal should be to build a framework of understanding – a structure for bringing trends to life and inspiring action throughout your organization. Brands need to understand how trends are evolving and interacting, when new trends are on the horizon and if more mature trends need to be retired.

When we take a framework approach to interpreting and activating trends, we can use them to address a host of questions and tasks companies face. We can apply our framework to:

- white-space exercises, which provide input for ideation around new products or services, as well as insights to frame each step of the development process;
- corporate strategy, which sets long-term business goals, gets up to speed on a new customer target and informs rebranding initiatives;
- primary research projects, which inform and influence expert interviews through screening criteria and effective development of questionnaires and discussion guides;
- marketing and communications, which empower culturally relevant messaging, marketing campaigns and brand activations;
- customer and partner collaboration, which provides a framework for stakeholders so that all parties are aligned on consumer needs; and
- internal alignment, which serves as input for new employee orientation, professional development, collaboration across corporate functions and larger organizational change initiatives.

With all of these potential applications, the argument for building and applying a consumer trends framework becomes hard to contradict.

Ranking of forces

The essence of a framework is the ranking of forces shaping your particular marketplace and brand fortunes, from the broadest level to the most minute. The framework captures the trend hierarchies and interrelationships at play as your products intersect with consumers' daily lives – their habits, needs and changing beliefs. The framework should be an organism, one that responds to cultural shifts large and small and therefore needs to be revisited on a regular basis – to be sure that core assumptions and strategies are still valid.

At the highest level of influence, fundamental forces are big drivers of ideas and behavior – social, technological, economic, ecological and political (STEEP) changes that are beyond the control of individuals. In fact, they are not even consumer trends in the strict sense. We would place urbanization, trade wars and climate change into this category.

Moving down a level, we find key macro consumer trends, which are the shifts that result from fundamental forces. A force like climate change, for example, has influenced people to think more about their own environmental behaviors and to become more thoughtful and conscious about consumption.

Below the macro layer can be a number of subtrends that might pertain to a category, industry or demographic group. Thinking again about the rise in environmental concern, in the automotive category we might see this trend manifest itself in accelerating demand for electric vehicles. In the food category, though, the subtrend might be people trying

to minimize their food waste through reducing packaging consumption or composting.

Frameworks are not just maps and rankings, though; they are developed through a process that is as important to their success as the most ingenious trend insight. The key steps to assembling a healthy and useful consumer trends framework can be summarized in three words – purpose, partners and process. Let's take a close look at each of these essential ingredients.

Purpose. To create a sound framework, we need to understand goals and needs. Will you be using it for internal inspiration or external thought leadership (or perhaps both)? What is the intended geographic footprint of your trends? Think, too, about how your category will be incorporated. Many of our clients want to understand what is happening in other categories to further spark inspiration. For example, a company in the food category will need to know how cars are being redesigned to properly inform packaging innovation for food-on-the-go.

Partners. To weave the framework into the organization, many of our clients first build an internal trends council – a cross-section of stakeholders from insights, marketing, strategy and other areas. The council evaluates the trends as they are developed and provides a sounding board for new ideas. While you want to include all essential voices, there is also the possibility of having too many voters; striking a balance between representation and crowd-sourcing is key.

Choose external partners with care, as well. External trends partners (like GfK Consumer Life) can help you fill in gaps in knowledge, bring unbiased experience to the project and can help tie multiple streams of data together. But one partner may not be able to provide all the answers you need; decide which decisions you have to make and find reliable sources for that information.

Process. You must evaluate the data you will use to build trends and construct them from the ground up. Are you only going to rely on survey data or will you be looking at other sources – a trends firm or point-of-sale data? Not all information is created equal; making these types of decisions requires the expertise of a seasoned trends-and-forecasting team.

In terms of sequence, we recommend following an approach that first looks at fundamental forces – the large shifts in culture that are outside of consumer control – then moving on to the signals and implications that define consumer trends at a macro (or key) and sub/category level.

Case study: Global food and beverage company

Recently, GfK partnered with a global food and beverage ingredient company to help them develop a unified, global consumer trends framework to be used for internal innovation inspiration and as a thought leadership device for their industry partners. As we set out on this journey, there were multiple objectives.

First was alignment around a common set of trends that could be leveraged by multiple divisions and regions. Important to this objective was developing a trends council so that each region had a voice in the development of the framework.

The next objective was to ensure the trends framework was solidly supported by data. Important to this effort was to have a syndicated, trended, global data resource in GfK Consumer Life. The client supplemented the Consumer Life data with behavioral evidence. This was a key step toward making sure that the attitudes were manifesting in real sales and product launch/marketing data.

Third, the research needed to be proprietary in nature and thus relevant to the food and beverage business. A proprietary framework creates more stickiness for internal stakeholders and it becomes more manageable for food manufacturing customers. In this case, four macro trends were identified, with two to three food and beverage trends per key trend.

The framework was further bolstered by a successful activation and socialization plan that also included carefully developed deliverables and data visualization tools. The fully developed framework has been used to internally strengthen the business case for branded solutions. The framework has also been shared with the client's customers to help them evaluate their current product portfolio and understand gaps in their product line based on the trends.

As you think about developing a consumer trends framework, there are just a few key ideas to remember. Activation only can happen if you effectively engage stakeholders and continue to integrate a trends perspective into ongoing projects. Be sure to provide the context to help stakeholders understand the "why" behind trends. And, lastly, keep your content fresh by evaluating and enriching your consumer trends program with additional inputs and perspectives. With ample forethought and a commitment to ongoing cultivation, your framework will pay dividends for many years to come.

Based in New York, Tim Kenyon is vice president, consulting in the Consumer Life division of research firm GfK. He can be reached at tim.kenyon@gfk.com.

••• special advertising section

10 TOP PRODUCT DEVELOPMENT COMPANIES

While product development and testing sound like two straightforward steps, it's never quite that simple. To develop a high-quality product that truly sticks, companies must consult a range of factors, such as consumer interest, pricing, packaging and even social and political elements. Companies that specialize in this area have developed processes, software and entire labs in order to gain deeper insight into what makes products successful.

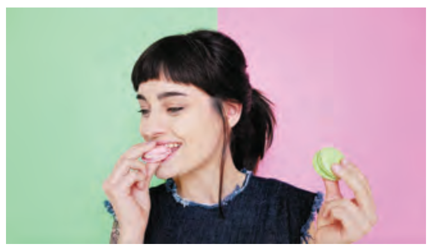
These companies offer a range of methodologies and facilities for every part of the product development process, with offerings such as in-home usage tests, consumer panels, test kitchens and survey software. For insight into your next product in the pipeline, consider these specialized research companies.

quirks.com/articles/2020/20200133.aspx

curion
Consumer Insights. Delivered.

Curion

Founded 2017 | 108 employees
Sean Bisceglia, CEO



Curion provides world-class insights. From quantitative to qualitative research, we apply proven, industry-leading, innovative methods to service over 65% of Global 100 companies. A full-service product and sensory insights firm, we work with clients to determine not just what products consumers prefer but also why they are liked and how to make optimizations. Clients mitigate

risk of marketplace failure by ensuring only quality products are introduced – providing repeatable delight for consumers. We accomplish this with our expert employees, sensory processes, fully-equipped facilities and data insights. In 2019 alone, we tested 105,000 consumers across San Francisco, Chicago, Dallas and New York. The result of a merger between Q Research Solutions and Tragon Corp., Curion pioneered many sensory methodologies considered industry standards today, including Quantitative Descriptive Analysis (QDA)® and Partnership Solutions™.

+1-224-632-1919
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Decision Analyst

Founded 1978 | 150 employees
Jerry W. Thomas, CEO

Decision Analyst is a global leader in iHUT (in-home usage testing), product optimization and related analytics. The firm executes projects with a focus on quality assurance standards, systems and processes. Its staff has evaluated over 1,600 products during the past four decades. Decision Analyst has its own consumer panels, product labeling, processing and shipping equipment and facilities to conduct IHUTS. Decision Analyst's IHUT system predicts consumer acceptance, determines the optimal set of ingredients or features and includes pricing optimi-

zation systems. In-home usage testing is an effective way to create better products, build brand share and boost profitability.

+1-817-640-6166
www.decisionanalyst.com/services/producttesting/

DRG

Turning Intelligence into Opportunity

The Dieringer Research Group Inc. (The DRG)

Founded 1974 | 73 employees
Lanie Johnson, President and CEO

New product innovation, improvement and testing are essential features of healthy brands. We help our clients make critical product development decisions with confidence by leveraging data-driven customer feedback on everything from concept optimization to prototype testing, packaging design, pricing and launch communications. Take advantage of our extensive qual and quant survey capabilities, in-house call center and on-site focus center to streamline your new product development process with a trusted, single point of contact. We bring over 45 years of strategic consulting and research experience uncovering opportunities to improve products and services based on insightful customer feedback.

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Just The Facts, Inc.™
Knowledge Is Your Competitive Edge

Just The Facts Inc.

Founded 1994
Bruce Tincknell, Managing Director

Just The Facts, Inc. has 30 years of product and new product testing experience. JTF Research works closely with clients to develop the optimal methodology to achieve desired client results (e.g., what's important about this research, its objectives, outcomes sought, how results will be used and much more). If your current research supplier doesn't understand the critical nuances of your needs, then their low-price research is strategically costly. Conducting quality product development and testing research means having a strategic partner to effectively navigate, guide and manage your important assignments: this means creating an effective plan for testing concepts, prototype samples, new products and existing product line changes with excellent analysis and reporting. Contact JTF for high-quality product testing. Let's discuss your specific needs and ensure your products are ready for market!

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www.justthefacts.com

THE NATIONAL FOOD LAB, INC

The National Food Lab

Founded 1982 | 100+ employees
Alan Roberts, Vice President

The National Food Lab, a Eurofins company, is a leader in product development and innovation. Our deeply technical and cross-functional team of sensory scientists, consumer researchers, food scientists and process engineers provide unmatched end-to-end solutions such as: agile, consumer-led development sprints to transform ideas from rough prototype to scalable formula; strategic category insights from Product Landscape™ studies; quantitative central location or in-home use tests to optimize product design or validate launch readiness; scientific exploration of new ingredients and processes; and product formulation support and co-man searches. We partner with clients to ensure their product success in the marketplace.

+1-763-354-2770
www.thenfl.com

Precision Research Inc.

Founded 1959 | 25-49 employees
Scott Adleman, President

We have decades of experience conducting product development research. Whether your needs are home-use product evaluation, usability lab testing or initial concept development, we are here to guide the way. Our unique 12,000-sq.-ft. research center has space needed for controlled preparation, testing and observation. We can host large products like automobiles, X-ray equipment and shelf displays. Additionally, our commercial test kitchen is available to prepare any food or beverage product you have in the pipeline. Our tasting room seats up to 30 people at laptops for rapid project turnaround.

+1-847-256-0827
www.preres.com

Schlesinger Group

Founded 1966 | 1000 employees
Tim Sauer, SVP, Client Solutions

The Schlesinger product test team is highly adept at planning and executing complex product development and testing programs. We support a variety of methods for product testing from facility and central location testing to in-home or on-site testing, using qualitative or quantitative or hybrid approaches to best suit your product and test objectives. We're uniquely positioned to add on other methods and techniques (in series or parallel) during key development or testing stages, such as surveys, focus groups, online interviews and emotional measures to enhance the value of your testing or to help deliver more compelling data. In addition, our government-approved FPG clinical research division supports clinical trials. You can contact Tim at Tim.Sauer@SchlesingerGroup.com.

+1-314-324-8094
www.SchlesingerGroup.com

SurveyMonkey

Founded 1999 | 1,200+ employees
Zander Lurie, CEO

With global panels built right into our robust survey platform and a new suite of end-to-end concept testing solutions, SurveyMonkey is a great fit for fast, iterative product development research on any budget. Using SurveyMonkey Audience, you can find exactly who you need to reach with pre-profiled targeting options or custom screening questions. Audience is fully automated so you can instantly check global project feasibility, get a cost estimate and launch your product feedback study with one click. If you need help getting started, our Audience Premium offering comes with expert survey consultation and additional services. Contact us to learn more or to get early access to our new concept testing solutions.

audience-sales@surveymonkey.com
svy.mk/quirks

Target Research Group Inc.

Founded 1986 | 26 employees
Greg Spagna, CEO

Target Research Group is a global, full-service sensory and consumer insights research company, celebrating its 33rd anniversary. Some of the largest brands rely on us for food and beverage, personal care, health care and legal research. We're experts in strategic product research: sensory, advanced modeling, segmentation and packaging. Our software platform, Kiwi Metrics, is powered by our proprietary knowledge graph representing 80% of the branded foods in the U.S. The platform democratizes data and analysis across research and development and marketing, enabling bolder decision-making and risk mitigation at every stage of the NPD process. Our Collaborative Insights Program is a turnkey solution, managed by Target onsite or offsite.

+1-845-426-1200
www.targetresearchgroup.com

Toluna

Founded 2000 | 1,400 employees
Frédéric-Charles Petit, CEO

Toluna, an ITWP company, provides consumer insights designed to empower success in today's on-demand, global economy. Powered by the perfect fusion of technology, expertise and the largest global community of influencers at the ready, Toluna delivers rich, reliable, real-time insights to individuals and companies of all sizes. Our automated consumer insights platform TolunaInsights™ underpins everything we do. Clients can access the platform directly, leverage Toluna's managed services or create fully-customized digital consumer insights programs via our engineered services. TolunaInsights was built to complement QuickSurveys, Toluna's on-demand platform designed for quick-turn, automated research.

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Thought leadership research: A labor of love

Kerry Sette, *Vice President, Consumer Insights and Research • Voya Financial*
Keri Hughes, *Senior Research Analyst • Voya Financial*
Andrew Chizever, *Senior Vice President, General Manager • LRW*

Interested in hearing learnings from our recent Voya Financial (VoyaCares) thought leadership study along with best practices in designing this research and how to best partner with internal clients? Our research partner, LRW, will also share their experiences (especially targeting low-incidence populations and whitepaper development). Content will include specifics in determining "white space," developing the story arc/dream headlines, the research process, ingredients for a successful working-session of the results and development of the final whitepaper.

Do you know your chickens? A case study in online panel development

Ron Pocs, *Regional Market Research Manager • CNH Industrial*

As a large manufacturing organization, the idea of creating an online panel of B2B customers to efficiently and cost-effectively conduct market research seemed a bit far-fetched. When I first broached the idea among others within the organization, I was told that I don't know my chickens (i.e., this will never happen). Today, the panel has been successfully running for over 3 years with 900+ members. How did it happen?

Give me more Dolly Parton! Country music and documentary film: A PBS love story

Eliza Jacobs, *Associate Director, Consumer Insights and Analysis • PBS*

In September 2019, filmmakers Ken Burns and Dayton Duncan premiered an 8-episode, 16.5-hour documentary film, "Country Music," on PBS. The challenges PBS faced centered around promoting a multi-episode film on a limited budget, as well as determining the best way to appeal to its core audience and simultaneously finding new consumers in a very crowded media marketplace. Come hear how PBS addressed these questions through a year-long, multi-pronged research agenda.

The Culinary Knowledge Graph

Greg Spagna, *CEO and Chairman of the Board • Target Research Group*

One app instead of the lab: Measuring CX + UX on mobile at scale is a new reality

Dmitry Gaiduk, *CEO • UXReality by CoolTool*

Develop decisive insights with behavioral science

Anders Bengtsson, *CEO • Protobrand*
Jeff Zaremski, *Senior Manager, Consumer and Market Insights • Dunkin' Brands*
Joe St. Hilaire-Bona, *VP Research and Insights • Protobrand*
Peter Costa, *VP Client Services • Protobrand*

Unearthing the unexpected: The power of machine learning

Carmel Dibner, *Principal • Applied Marketing Science*
Kristyn Corrigan, *Principal and Innovation Practice Lead • Applied Marketing Science*

Decoding signal vs. noise: How Microsoft uses proactive insights to stay ahead of the curve

Tanya Pinto, *Director, Customer and Market Research • Microsoft*
Marc Goulet, *Vice President • Russell Research*

Purdue University Masterbrand: Finding the essence

David Moore, *Market Research Consultant • Purdue University*
Keri Downs, *Consultant • Brandtrust*
Ethan Braden, *VP of Marketing and Media • Purdue University*

Un-Photoshopped DIY: What client-side DIY research really looks like

Loretta Hudelot, *Manager, Consumer Insights • Verizon*

Counterintuitive thinking: Reframing research baseline assumptions

Susan Fader, *Insight Navigator • Fader & Associates*

Black British culture

Jaclyn Lundblad, *Head of International Insights • Buzzfeed*

Regionality, fragmentation and the power of hyper-local insights for brands to win

Ruth Ingram, *SVP Research and Strategy • Insight Strategy Group*
Laura Saeva, *Sr. Manager Consumer Insights and Analytics, North American Beverages • PepsiCo*

Choosing from a feast of options: How to integrate qualitative tech for maximum impact

Kelley Styring, *Principal • InsightFarm*
Jason Horine, *Vice President Client Solutions • Schlesinger Group*

The power of System 1 thinking

Bruce Gillman, *Partner • Lieberman*
Allison Lodato, *Vice President • Lieberman*

Using hybrid methods to supercharge your qual research

Ray Fischer, *Founder and CEO • Aha! Strategic Online Qual Platform*

How to get more ad attention in a world of dwindling attention spans

Annett Pecher, *Director • Emotional Logic*

Truly understanding moments

Richard Heath, *Managing Director • Blue Yonder Research*
Hannah Rogers, *Client Lead • Blue Yonder Research*

Viewer disrupted: The psychology of media engagement

Mark Doherty, *Vice President, Practice Leader • Chadwick Martin Bailey*

AI for automated insight generation

Suresh Kumar, *Head of AI Solutions • Palo Alto Research Center*

To make a compelling dashboard

Balázs Svidró, *Data Visualization Expert • DataExpert*

Partners not participants: Value exchange in user research

Lauren Cauchy, *Market Researcher • Shopify*

Changing the subject

Kevin Cowan, *Insight Manager • BBC World Service*

Unlocking growth with corporate market insights: Data, context and credibility

Dirk Kansky, *Vice President, Global Market Insights • SAP*

Building, positioning and launching insight-led propositions for SMEs

Tom Byrd, *Head of Commerical Insight, B2B • British Telecom (BT)*

Broadband is the life-blood of modern business and the threat of possible broadband outage carries significant risk. BT wanted to offer business customers a wireless failover option for if and when their broadband ever dropped, and teamed up with Populus to test SMEs' attitudes to price points and product perceptions to inform product development and positioning.

The marriage of MRX & UX: The power couple

Jessica Irwin, *Director, CMI • Verizon*

Currently, most research companies and departments have user research and market research operating separately. The problem is that the stakeholders are only getting half of the insights story at any given time. This presentation will suggest that these two disciplines work together to drive more holistic insights. The payoff is holistic problem solving, aligned cross-functional teams and better customer experience that leads to higher returns.

Macro meets micro: Driving collaboration through market research

Katie Solovieva, *Vice President, AlphaWise Primary Research • Morgan Stanley*

This presentation will showcase an example of a collaborative, high-impact project to emphasize how market research can bring insights on both the macro and micro level. We'll start with a quick intro of AlphaWise and how the team adds value to research workflow before discussing a large scale case study on the Gen Y and Z Youth Boom – we'll talk about the methodology and why it was a differentiated piece of research; key findings, insights and challenges; how research was used by multiple teams within the department; and the importance of marketing as well as generation of follow-up ideas.

Rotary International identifies global engagement trends and drivers using cross-disciplinary insights to understand participants' journey

Anja Van Ostrand, *Research and Evaluation Partner • Rotary International*
Michelle Roseborough, *Senior Research and Evaluation Partner • Rotary International*
Amanda Reid, *Manager, Reserch and Evaluation • Rotary International*

Project 24: Inside the daily lives of Americans...and why it matters

Michelle Poris, *Vice President • Smarty Pants*

The Kano model for greater customer-centricity in fragrance development

Marion Emorine, *Consumer Product Insights Manager, R&D Luxury Division • Coty*
Sophie Archambot-Corbiére, *Head of Beauty Division • Strategir*

How Lucid's API helped On Device Research double its quarterly programmatic revenue

Stuart Gullock, *Director, Business Development • Lucid*
Alistair Hill, *CEO and Co-Founder • On Device Research*

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Worth more than 1,000 words: Using consumer-generated video

Stacy Shaleen, *Market Insights Manager • Cargill*

How do you conduct ethnographies and gather in-use insights when you have limited time and budget? Let consumers take you into their world with their phones. In today's smartphone-run world, everybody can provide a high-quality view into their buying decisions and usage habits. Like traditional ethnographies, the learning goes well beyond the questions asked. Without a bunch of strangers in their barn, consumers were comfortable showing all their routines and challenges.

Be more than a forgotten footnote: Improve the activation of research and insights in your organization

Vanessa Roddam, *Manager, Shopper Insights and Analytics • Constellation Brands*

Sometimes large research projects create fantastic looking reports and powerpoint slides but they see disproportionately small adoption within an organization. And outputs from robust research sometimes get overshadowed by one or two statistics from the research instead of illuminating actionable insight. How can we better connect insights to action? And how can even the most complex projects deliver salient, actionable solutions? Keep the research methods robust and make the deliverables more embraceable.

The role of analytics tools in modernizing competitive insights

Chris Chute, *Vice President, Global Field Insights • SAP*

The Corporate CI function must modernize to be more impactful across the business. Analytics tools help CI staff touch more of the business more frequently and in ways traditional CI research does not.

We are what we... feed our kids? The what, where and why of today's grocery purchases

Bess Devenow, *Director of Marketing • Prodege MR*

Better behavior predictions through better behavior testing

Anne Stephenson, *Partner • Explorer Research*

Keeping it real – and getting more predictive research results

Jonathan Asher, *Executive Vice President • Explorer Research*

The Brexit antidote: Activating London's good news room

Tim Osborn, *Associate Director • Verve*
Harry Mirpuri, *Director, Research and Insights • London & Partners*

From story to glory

Jeffrey Henning, *Executive Director • MRII*

Cutting-edge research in associations and nonprofits: Hitting the goals and making a "profit" in a nonprofit world

John Laprise, *Market Research Manager • Radiological Society of North America*
Lisa Herceg, *Director, Business Insights, Research • National Association of REALTORS*
Randa Ulankiewicz, *Market Research Analyst • Society of Actuaries*

Utilizing multiple forms of research to understand the plus-size customer

Katy Donahue, *Head of Strategy and Operations • Fabletics*
Elecia Allen, *Research Analyst • Fabletics*

With an increasingly growing focus on inclusivity in the apparel space, it's important for companies to keep an eye on the plus-size customer and what her needs are. At Fabletics, we already offered activewear up to size 3X, but decided that plus sizes needed to be redeveloped to keep our customers happy. Learn how Fabletics utilized data analytics, qualitative and quantitative research to help inform business decisions on the plus-size customer.

How to leverage research to build meaningful brands

Emmanuel Probst, *SVP, Brand Health Tracking and Adjunct Professor • Ipsos and UCLA*

Learn where to focus your media spend

Kyle Gollins, *Vice President, Client Development • Savanta*

Macro and micro journey analysis: A smart approach to consumer journey research

Candice Rab, *SVP, New Products • Luth Research*
Becky Wu, *SEVP, Research and Technology • Luth Research*

Omnichannel campaigns: Which one is the most profitable?

Jennifer Roberton, *Managing Director • respondi*
Bianca Bush, *Research Manager • MediaCom*

Working together: NPR's research and digital analytics teams build a survey dashboard

Claire Rogers, *Senior Digital Analyst • NPR*
Alex Bargiacchi, *Senior Analyst • NPR*

NPR's audience insights department houses two sub-teams – research and digital analytics. Our work provides a look into how our audience consumes and engages with our content, driving audience-centered decisions. Like many multifaceted teams, collaboration is an aspiration for the department. As two newer members, one in research and the other in digital analytics, we decided to take one step toward bringing together our skills to produce one product – a dashboard.

How to win hearts and minds among newly socially conscious consumers

Clémence Le Goupil, *Consumer Insights Specialist • Johnson & Johnson*
Sophie Archambot-Corbiére, *Head of Beauty Division • Strategir*

Neutrogena is a brand of the Johnson & Johnson family of consumer companies. When it comes to offering consumers sustainable facial wipes, the challenge is that consumers want a great product experience, an environmentally friendly product and a reasonable price. In this context, using both implicit and explicit data helps to go deeper in the optimal mix definition.

Can you DIG it? Insight Colgate-Palmolive's global insights platform

Frank Santiago, *Global Knowledge Management Manager • Colgate-Palmolive*
Valerie Molina, *Global Knowledge Management Associate • Colgate-Palmolive*

Colgate-Palmolive's insights platform, Driving Insights Globally, gives insights managers fast answers to their business questions. But in order for business decisions to truly drive decision making, they have to be top-of-mind across commercial development functions. Using AI-powered technology and sophisticated activation campaigns, Colgate's commercial development team can now harness the same powerful insights as the knowledge management team. Hear from Frank Santiago and Valerie Molina on how insights drive commercial decisions.

Personalization at scale

Prasan Kumar, *Strategy Director • Ogilvy*

What responsibilities and opportunities do brands have in tackling the biggest threat the world faces?

Hall & Partners

Improving research by doing research: Learning from qualitative research participants and the sources we use to acquire them

Renee Wyckoff, *Research Design Engineer • L&E Research*
David F. Harris, *Independent Consultant •*

Powered by people: How Landor and Acoustic created a new brand and culture using AI-driven human insights

Maarten Lagae, *Director, Insights and Analytics • Landor*
Alyssa Vitrano, *Head of Brand and Creative • Acoustic*
Noele Emmons, *Key Account Manager, Agency • Remesh*

Real business examples of text analytics in action

Normand Peladeau, *President, CEO • Provalis*

Stop, automate and listen: Demystifying report automation

Benjamin Rietti, *CEO • E-Tabs*

fMRI: The panacea for consumer thoughts, or not?

Natalia Filvarova, *MultiSense Research Associate • Fraunhofer Institute for Process Engineering and Packaging*

Wake up, Tracker, and make yourself useful – It's 2020!

Mary McIlrath, *Senior Vice President and Partner • C+R Research*

Managing online communities to achieve ROI

John Voda, *Senior Market Research and Analysis Manager • AT&T*

Learn best practices for managing an online research community to develop topics for weekly research and to ensure you don't drown in work (since it never ends). Most importantly, learn how to make sure results are noticed by management to ensure your community achieves an ROI (and maintains funding).

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Which one is not like the other? The differences between UX and market research

Cara Woodland, *Market Research Manager • eMoney Advisor*
Evan Eiswerth, *Supervisor, User Experience • eMoney Advisor*

To better inform the digital age, market research and the methodologies have adapted in many ways. A new breed of researcher has also formed out of the digital age to focus on user experience design and user-centric development.
The goal of this session is to help define the similarities and differences between a user experience researcher and market research.

Beyond customer journey-mapping: Understanding impact of touchpoints

Suresh Kumar, *Business Insights Manager • Pella Corporation*

In a complex and multi-channel marketplace, mapping the customer journey is important – but it is more critical to understand the engagement, influence and impact of the various touchpoints in the consumer's buying experience and translate them into actionable insights on the touchpoints impact on key brand metrics and brand strength.

Sense and sensibility: A story of new flavor ideation and concept innovation

Cristian Enriquez, *Senior Business Executive • Remesh*
Ratapol Teratanavat, *Senior Director of Consumer Insights and Market Research • Takasago*

Unleashing the power of connected and validated data

Caroline Frankum, *Global CEO • Kantar Profiles*

Only missing the snack: Video research interviews like face-to-face interactions

Garnette Weber, *COO • itracks*
Dan Weber, *CEO • itracks*

How much enjoyment can an indulgent snack really bring when life gets in the way?

Keren Novack, *VP of Client Services • Curion*

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Love Island: The cultural zeitgeist

Elisha Temminck, *Commercial Audience Manager • ITV plc*
Glenn Gowen, *Head of Commercial Audiences • ITV plc*
Amanda Hammond, *Commercial Audience Executive • ITV plc*

Building on our multi-award-winning "Love Island: Linking Real World Behaviors to Reality TV" research from 2018, our ambitions haven't stopped there. With Love Island 2019 representing the biggest show on ITV2 ever, our research ambitions have only grown as well.

This year, we integrated more methodologies than ever before in order to bring together a holistic view of Love Island's footprint, from a cultural, program and brand partnership perspective.

Fidelity International: Democratizing the voice of the client to drive a client-centric transformation

Pete Johnson, *Associate Director, Voice of the Client • Fidelity International*

Setting themselves the target of being world-class in client experience, investment management firm Fidelity International launched their new global NPS program in 2017 in partnership with Medallia. The program allows the business to live and breathe the voice of the customer with real time feedback available to everyone at their fingertips to act upon. Join this session to hear from Pete Johnson, voice of the client associate director, on how they have done this, with a particular focus on how they have engaged senior leaders, proven financial linkage and improved employee engagement at the front line.

Reality Voice: Tune in to new perspectives

Garnette Weber, *COO • itracks*
Kathy Fitzpatrick, *VP Business Development • itracks*
Christine Keller, *Program Manager, Customer Centricity • MassMutual*

Beyond the screener: Reducing fraudulent and disengaged respondents

Adam Dietrich, *Vice President • CloudResearch*
Leib Litman, *Co-Founder, Director of Research • CloudResearch*

Consumer segmentation for improving health engagement

Steven Cooley, *AVP, Market Research • Health Care Service Corporation*

How LivingLens helped Deliveroo put their video content to work

Carl Wong, *CEO • LivingLens*
Lydia Howland, *Experience Team • Deliveroo*

Accelerating brand building and innovation using agile insights approaches

Monika Wingate, *CEO and Co-Founder • Digiste*
Todd Adrian, *Sr. Director of Customer Insights • Harry's*

The lenses through which we see the world – QRCA-curated session

Tom Rich, *President • Thomas M. Rich & Associates*

Maximize your creative thinking in the AI age: Unlock this #1 valuable skill – QRCA-curated session

Marta Villanueva, *President • NuThinking, Inc.*

Identifying the rules of best-in-class imagery and copy on Sky Q

Edward Nash, *Qualitative Research Controller • Sky*
Emma Bennet, *Senior Qualitative Research Manager • Sky*

Closing the experience gap: Diagnosing your gap and identifying the best strategy to close it

Simon Clough, *Chief Strategy Officer, U.K. • Clear M&C Saatchi*
Geraint Jones, *Global Marketing Director • Clear M&C Saatchi*
Jim Whelan, *Managing Director, USA • Clear M&C Saatchi*
Rhonda Hiatt, *Chief Strategy Officer, USA • CLear M&C Saatchi*

Visual semiotics: Shouting without words – QRCA-curated session

Michael Sack, *Founder and Owner • Brand Kinetics LLC*
Todd Trautz, *Chief Innovation and Solutions Officer • Maru/Matchbox*

Tapping organizational change to increase market research relevance

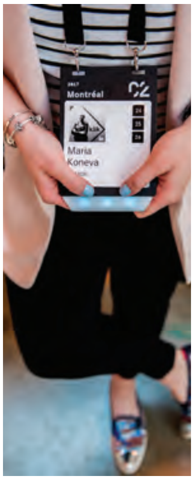
Monika Wingate, *CEO and Co-Founder • Digiste*
Heather Vossler, *Director of Insights and Innovation • Hormel Foods*

Many organizations are seeking out agile approaches as they adjust to the accelerating pace of innovation. As a result, insights teams are shifting to agile research methods that allow them to simultaneously build, test and learn. In this presentation, Hormel Director of Insights and Innovation Heather Vossler and Digsite CEO Monika Wingate will discuss how combining the right tool with an agile research approach enables teams to quickly get in-context learning and deep consumer insights.

THE QUIRK'S EVENT

FOR MARKETING RESEARCH AND INSIGHTS PROFESSIONALS

LONDON BROOKLYN CHICAGO



INTERACTIVE SMART BADGES

Klik's interactive badges allow for easy and fast networking all in one place. Attendees in close proximity can quickly exchange information simply by both pressing and holding down the bottom of the badge. Bright LEDs will illuminate and flash, letting you know that the information has been exchanged. Attendees can also receive content from speaking sessions without having to wait until after the event. During a session, simply click your badge and any materials the presenters make available will download and be accessible in the app. The Klik badge puts you in charge of the content you receive and connections you make!

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- Chat with other attendees and even request meetings
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- Store your connections and event materials
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SPECIAL EVENTS IN EACH LOCATION

OPENING NIGHT

Cocktails with Quirk's

We've had a blast hosting Cocktails with Quirk's in the past and The Quirk's Event wouldn't feel complete without everyone enjoying a few cocktails on us! After the first day of the show is done, mingle and network in the expo hall, enjoy free drinks and appetizers and take in the experiences with other attendees.

EVENT CLOSING

Expo Hall Happy Hour

After the sessions end, grab a beer and stroll through the expo hall to learn and experience all of the latest and greatest the industry has to offer.

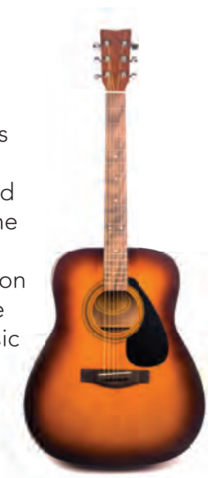
THE RESEARCH CLUB

The Research Club Mixer

Late night snacks, drinks, and networking with your fellow Quirk's Event attendees.

Separate registration required, see the website for details.

MR Musical Jam Session



Hear talented MR musicians perform live! Quirk's will be bringing together a talented collection of musicians in the market research industry to perform. The MR Jam session is a great way to kick off the event by hearing great music and networking with your peers!

insights ASSOCIATION

Greater New York Chapter Closing Party

Join the Insights Association Greater New York Chapter for an after Quirk's Networking party. Have one last conversation with friends old and new before you head home. Light food fare provided, cash bar for drinks.

TheQuirksEvent.com

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CALENDAR OF EVENTS

••• can't-miss activities

IQPC will hold its Chief Data and Analytics Officer Exchange on **January 26-28** at the Hyatt Regency in **Phoenix**. Visit bit.ly/2kGrfEg.

KNect365 (IIR) will hold its Media Insights and Engagement Conference on **January 27-29** at the Royal Sonesta in **New Orleans**. Visit bit.ly/2eyPzmx.

IQPC will hold its Customer Contact Week event on **January 28-31** at the JW Marriott in **Nashville, Tenn**. Visit https://bit.ly/2orjPq3.

QRCA will hold its 2020 Annual Conference on **January 29-31** in **Austin, Texas**. Visit bit.ly/2vKUrfc.

Corinium Global Intelligence will hold its Chief Customer Officers and Influencers, USA event on **February 3-4** in **Atlanta**. Visit bit.ly/2Q5KKAE.

SampleCon 2020 will be held on **February 3-5** at the Ritz-Carlton in **Atlanta**. Visit samplecon.com.

2020 Pharma Market Research Conference USA will be held on **February 5-6** in **Newark, N.J.** Visit bit.ly/1Sh6Yhi.

Quirk's will hold the 2020 Quirk's Event – London on **February 11-12** at the Intercontinental 02 in **London**. Visit thequirksevent.com.

The **Research Club** will be hosting the London Quirk's Networking Party on **February 11** at the All Bar One 02 in **London**. Visit bit.ly/2mzJNXb.

The **American Marketing Association** will hold its 2020 Winter Academic Conference on **February 14-16** at the Hilton Austin in **San Diego**. Visit bit.ly/2mFj9wg.

The **Merlien Institute** will hold its Qual360 EU event on **February 18-19** in **Berlin**. Visit eu.qual360.com.

Worldwide Business Research will hold its eTail West 2020 event on **February 24-27** at the JW Marriott in **Palm Springs, Calif.** Visit bit.ly/2h7gbOR.

IQPC will hold its Customer Contact Week Australia event on **February 25-28** in **Queensland, Australia**. Visit bit.ly/2m9NbrR.

IQPC will hold its Customer Contact Week Asia event on **March 3-4** in **Singapore**. Visit bit.ly/2l7wRrj.

Quirk's will hold the 2020 Quirk's Event – New York on **March 3-4** at the Marriott Brooklyn Bridge in **Brooklyn, N.Y.** Visit thequirksevent.com.

IQPC will hold its Customer Contact Week Executive Exchange event on **March 22-24** in **Miami Beach, Fla.** Visit bit.ly/2kyNbku.

The **Merlien Institute** will hold its Qual360 NA event on **March 24-25** in **Washington, D.C.** Visit na.qual360.com.

KNect365 will hold its Marketing Analytics and Data Science – West event on **March 31 - April 2** at Hotel Kabuki in **San Francisco**. Visit bit.ly/2hpc3E6.

NMSBA will hold the 2020 Neuromarketing World Forum on **April 1-3** in **Los Angeles**. Visit bit.ly/2HnGcm3.

Quirk's will hold its 2020 Quirk's Event – Chicago on **April 6-7** at Sheraton Grand in **Chicago**. Visit thequirksevent.com.

The **Advertising Research Foundation** will hold its AUDIENCExSCIENCE 2020 conference on **April 19-22** at the Hyatt Regency in **Jersey City, N.J.** Visit bit.ly/2kY3EiE.

IQPC will hold its CX Exchange for Retail event on **April 21-22** in **London**. Visit bit.ly/2l7EE8o.

The **Population Association of America** will hold its 2020 Annual Meeting on **April 22-25** in **Austin, Texas**. Visit bit.ly/25wns9T.

Intellus Worldwide will hold its 2020 summit on **April 29 - May 1**. Visit bit.ly/2RDXQov.

KNect365 will hold its FUSE 2020 event on **May 4-6** at the Encore Boston Harbor in **Boston**. Visit bit.ly/2vpiqRB.

AAPOR will hold its 2020 Annual Conference on **May 14-17** at the Hilton in **Atlanta**. Visit bit.ly/2ouuwVL.

LIMRA will hold its 2020 Marketing Conference on **May 27-29** at Caesars Palace in **Las Vegas, Nev.** Visit bit.ly/2quzGSv.

The **American Statistical Association** will hold its Symposium on Data Science and Statistics on **June 3-6** at the Westin Pittsburgh in **Pittsburgh, Pa**. Visit bit.ly/2HutJN2.

we.CONECT Global Leaders GmbH will hold its CiMi.CON Evolution EU event on **June 15-16** at the Maritim proArte Hotel in **Berlin**. Visit competitive-market-intelligence.com.

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

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10 minutes with...

Lauren Phillips

Director of Research, Visit Fort Worth

"I'm all about turning insights into action and I am excited for the day where I can come into my office, log into the database system and guide my team on what should be done next."

Who has influenced your career the most?

I have met so many impactful professionals during different points of my life. My third internship director, Nikki Barjon, brand director and former hospitality executive, truly changed the trajectory of my career. Barjon was quiet, but made the loudest moves in Atlanta through her clients and services. I wanted to be just like her and interface with clients as she did, but she saw something in me that I never imagined – a researcher. She told me one day that data was the future and I was really good at completing my research tasks. I didn't realize that day eight years ago that my Google alerts and searches would evolve into what I do now.

Do you have any tips for researchers who are new to the tourism industry?

Connect the dots and speak up! In a new role, never assume that something has already been done and don't forget your past. Whatever you did in past roles can apply in ways that make a difference for your team. It's in your power to be a change agent. You are important, and you were hired for a reason!

You conducted an attendee attitudinal survey during South by Southwest Conference & Festivals (SXSW). What was the most challenging part of the study?

This was the most exciting event I've ever been a part of. My marketing team created an activation where we ultimately brought Fort Worth to Rainey Street in Austin, giving attendees an opportunity to experience the culture that the city of Fort Worth has to offer – country, rap, BBQ, salsa, travel, film and an emerging group of creatives.

The challenging part was that I've never done on-site surveys before so this was truly trial and error! My goal was to see how the positioning of attitudes about our site activation changed during and after the event. Thankfully, there were enough responses received post SXSW and the attitudes ultimately aligned! Being part of my organization's marketing team, I was proud to see that Fort Worth branding played a key factor in convincing guests to stop by our Fort Worth Haus at SXSW according to pre- and post-survey responses. Surprisingly, free food was not the number one factor that reeled guests in! Branding played a vital role.

What methodologies or new tools do you hope to utilize in the coming year?

A centralized database system with Entrada Insights! I always wanted an output tool that could point me and my team in the right direction. I am so over the days of pulling report after report, only to say, "Hey, look at this cool information!" I'm all about turning insights into action and I am excited for the day where I can come into my office, log into the database system and guide my team on what should be done next. I am embracing this model and I understand that it is not replacing me. It is allowing me to become a more powerful resource for my team, partners and stakeholders.

Read the full interview at www.quirks.com/articles/2020/20200122.aspx.