QUIRK'S

For marketing research and insights professionals

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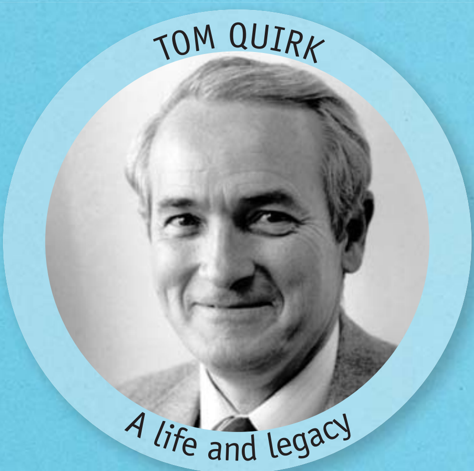
COVID-19's impact on African American, Asian and Hispanic consumers

PLUS

Is targeting generations a waste of time?

Using mystery shopping to find CX/UX pain points

Five shopper insights fundamentals that still apply



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Quirk's Marketing Research Review
July/August 2020
Volume XXXIV Number 4
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CONTENTS

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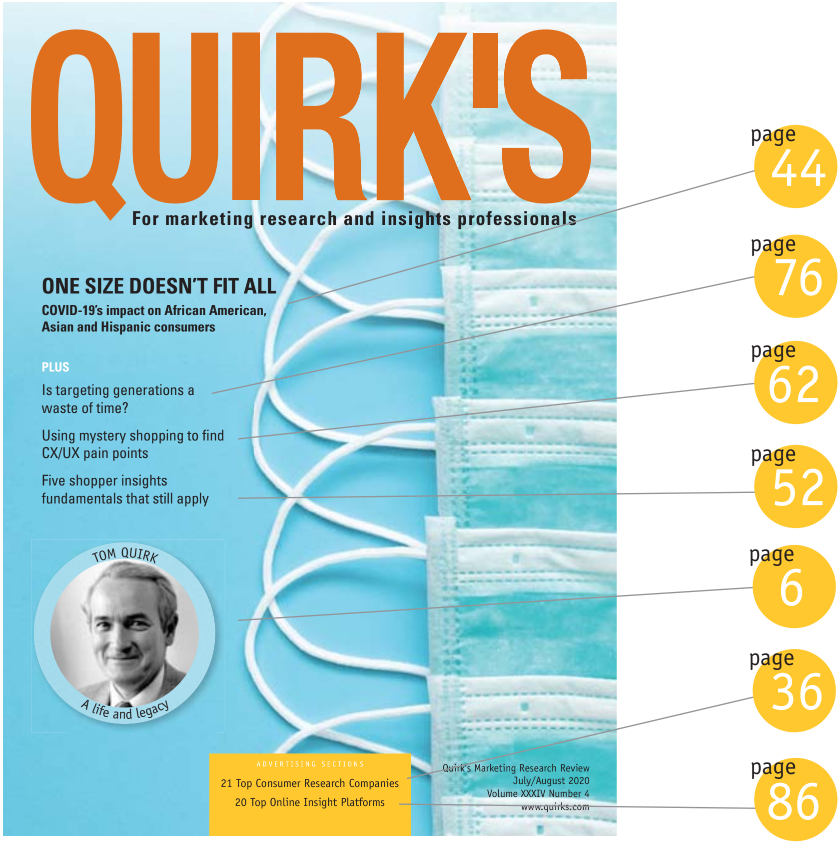

ON THE COVER

44 One size doesn't fit all
COVID-19's impact on African American, Asian and Hispanic consumers
By Roben Allong, Patricia Lopez and Iris Yim

FEATURES

48 Habits old and new
Unpacking consumer elasticity in a COVID-19 world
By Lincoln Merrihew

52 The more things change...
Five shopper insights fundamentals that still apply
By Bill Bean

56 The aisles have it
Using in-store behavior analytics to bridge the gap between surveys and sales
By Rajeev Sharma

62 Tell them to get lost
Using mystery shopping to find CX/UX pain points
By Elaine Buxton

66 A healthy interest
With better-for-you foods, what claims are consumers buying?
By Antje Sardo

72 Real staying power?
Move over recycling, some new trends are in town
By Jennifer Wehr Holt and Bridget Nichols

76 Truly just a number
Why marketing based on age cohorts doesn't make sense
By Adam Cook

82 Stop making sense
How counterintuitive thinking can inject some fresh perspectives into your research
By Susan Fader

COLUMNS

16 Trade Talk
Tom Quirk's lasting legacy
By Joseph Rydholm

32 Data Use
Assessing a brand funnel using comparative discriminant analysis
By Michael Lieberman

DEPARTMENTS

6 Tom Quirk: A life and legacy
12 Click With Quirk's
14 In Case You Missed It...
17 Ask The Expert
20 2020 Quirk's Hot List
24 Survey Monitor
36 21 Top Consumer Research Companies
86 20 Top Online Insights Platform Companies
94 Calendar of Events
97 Index of Advertisers
98 Before You Go...

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SETTING AN EXAMPLE

Tom Quirk's values shaped his life and his business

By Steve Quirk

My father, Tom Quirk, would not approve of this article. He was a humble, private man who never liked to be in the spotlight – it was not in his nature.

But on the occasion of his passing in May at the age of 87, I wanted to tell you a bit about his life because his morals, ethics and character are the bedrock upon which Quirk's Marketing Research Review was built and operates under to this day.

Born in 1932, Tom was the sixth of 11 children. His father was a successful lumberyard owner and he grew up with means that many of his generation did not have. Tom's formative years were during WWII. He would often talk about how his generation was left to fend for themselves because everyone was understandably focused on the war effort. Witnessing those times and seeing the sacrifices people made is what developed his work ethic and sense of giving for the greater good.

While longtime readers of Quirk's may recognize Tom as the man whose last name gives Quirk's Marketing Research Review its distinctive title, there are many others who don't know the story of how the magazine started.

In a nutshell, in the course of his years in the publishing and marketing research fields, Tom repeatedly saw the need for a publication that could educate marketers on the use and value of research. And, since people often come to marketing research positions from a variety of backgrounds and hence may not be versed in all of the techniques and their accompanying jargon, the magazine's content would have to communicate to a wide audience, from the seasoned pro to the marketer-in-training.

From here, I will let my father tell the story of how Quirk's came to be. Below is an excerpt from an article we published in 2011 for our 25th anniversary.

After my army service was completed in 1956 I returned to the University of Minnesota and took a number of advanced math and economics classes with the thought of obtaining a graduate degree in one of those two fields. It had always been my intention to work within the business community and thus the degree itself was not of much importance. Thus, when an older brother who was doing market research at G.H. Tennant Co. decided to return to college to obtain a Ph.D. and suggested I replace him, it took me only a few minutes to make the move away from academia. (It was a good decision for my brother as he went on to become a noted econometrician as a professor at Cal Tech.)

The main emphasis of the position was on studying the markets that the company's products served using government census of manufacturers statistics and information from within the organization. Using this information we attempted to forecast unit sales by setting sales quotas and assist the production department in inventory. Similar work was done at my next place of employment, the D.W. Onan Co. At no time were either of the market research departments asked to evaluate or assist in the marketing of the products themselves.

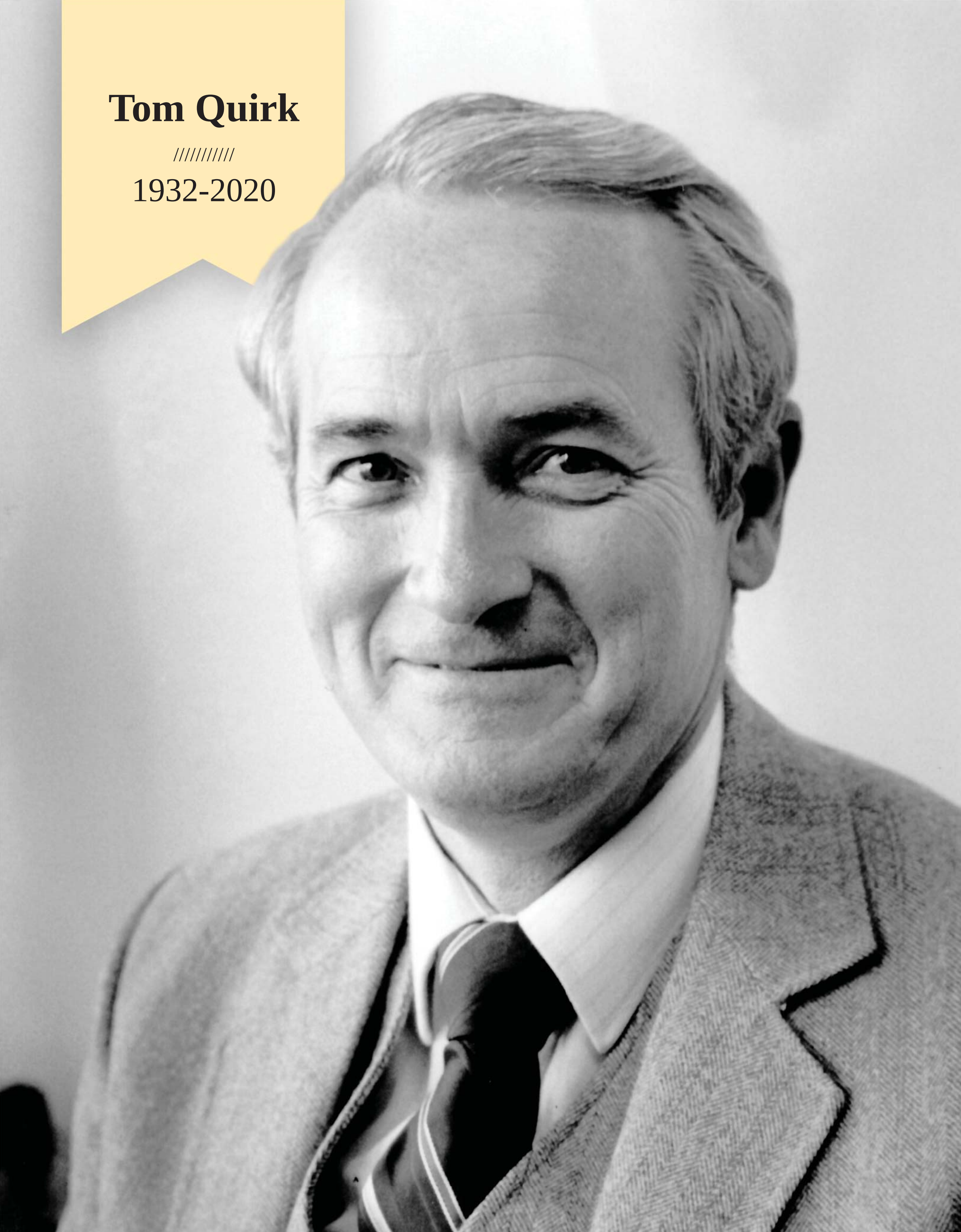
In 1963 I was hired as the director of research for Minneapolis-based Miller Publishing Company. It was a 90-year-old business magazine publisher with a strong position in the field of agribusiness. Each publi-

www.quirks.com/articles/2020/20200726.aspx

Tom Quirk

///////////

1932-2020



Just as essential are hard work, adaptability, strong customer service and a true respect for and enjoyment of the industry the magazine serves.

Top: Tom making 1st lieutenant in the Army.
Middle: Leading a focus group in the 1960s.
Bottom: Tom circa 2016.

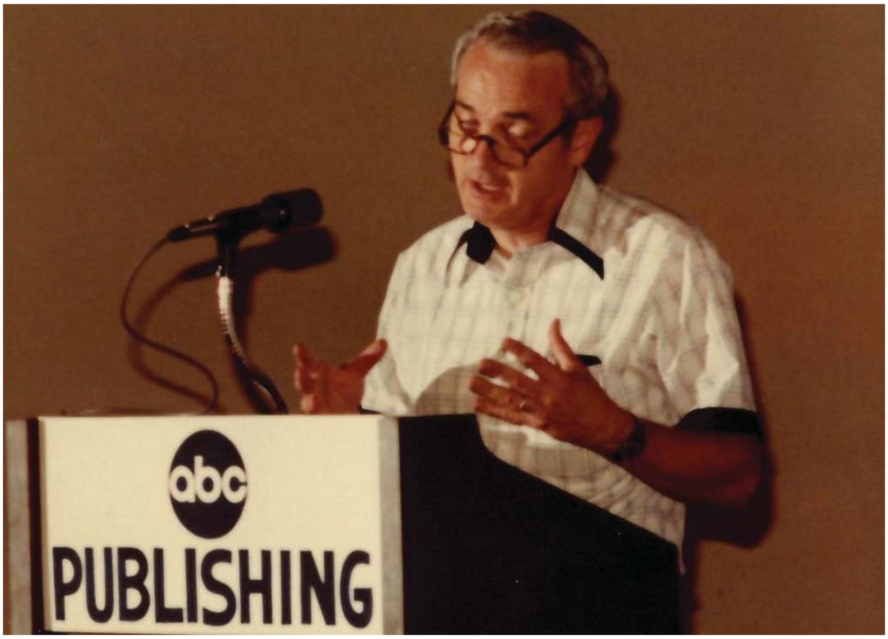
cation group had a marketing director who had considerable autonomy in the way in which his/her publication was presented to customers and prospects. My arrival on the job came shortly after the company had created a division for two retail merchandising magazines. It was a competitive market and the marketing director, Paul Anderson, asked for my assistance in creating a plan that would make the Miller Publishing magazines industry leaders.

Wanted ideas and information

Most publications at that time presented market data that were acquired from third-party sources and available to everyone. We found that that their customers and prospects wanted ideas and information on ways they could be more successful in selling their products and services. We found that establishing a panel of retailers who represented the universe gave us an opportunity to meet this need. The response from the core audience was very positive and both publications achieved above-average growth.

The response from the Miller Publishing management encouraged more innovation and the department staff was enlarged. Included was a young researcher, Dale Longfellow, who provided a number of ideas to help the company's publications maintain their positions as leaders in each of their respective fields.

Prior to 1968 all of the data we presented was done for the publications and made generally available. But we were beginning to have requests from major marketers to use our lists along with our knowledge of the various markets to do proprietary studies. Our first reaction was mixed. We were flattered by the faith in us by these companies but there was also concern how we



Top: Addressing an ABC Publishing meeting in 1977.
Bottom: Tom, Dale Longfellow (left) and Ken Becker (center) at Rockwood Research in 1984.

would be able to ensure that we could provide the confidentiality that is so critical to proprietary work.

We finally were able to solve the problem by separating our commercial research and the in-house research functions. All commercial research was done at a satellite location with employees specifically assigned to those functions.

Had little experience

It was shortly after embarking on the commercial research project that the idea of a publication for those involved in marketing research crossed my mind. When presenting data from our magazine research we usually met with marketing directors or advertising managers. Now we were calling on members of the market research departments. While the department managers were aware of the various techniques, many of their analysts had little experience in marketing research. Many firms used this position as part of long-term training in their marketing system. Many analysts did not view the position as a permanent job. All of this tended to make projects take longer than necessary and to subject clients to additional costs.

Another problem was the lack of confidence in research departments within certain companies. The departments did not have evidence that other firms were successfully using marketing research to increase sales and profits. We, of course, could not disclose how a number of our projects had done just that.

We needed a way to show how research had been beneficial. Confidential information was not needed to do this. Rather, clear, understandable examples of how filling an information gap helped an organization meet its marketing or advertising goals would do the trick. It would be something that a research manager could use as an example to show to higher management. The magazine would also provide news of the industry and the personnel involved. Information on providers of related products and services was also needed.

I set these ideas aside as I concentrated on my work but in the ensuing time I encountered several other instances where examples of successful applications of marketing research would have been helpful.

In 1978 the Miller Publishing Company was sold to American Broadcasting Company and I was required to sign a 66-month employment agreement. In 1984, with two associates, I started a new company, St. Paul, Minn.-based Rockwood Research Corp., which was immediately acquired by Farm Journal magazine. That employment agreement only lasted until 1986

Tom being appointed a vice president at Miller Publishing circa 1973.

Tom and daughter Ann talking with students at a school in Jamaica.

when I, at last, had the opportunity to fulfill my dream.

A number of friends helped

Although I had been with publishing companies I had never been responsible for putting out an issue. Fortunately a number of friends helped through the first few issues including Emmet Hoffman, Dave Hahn, Keith Hunt and Robert Truhlar. They provided the necessary expertise to help us produce a credible product.

The response from the market was beyond expectations. In those early years, as today, we were guided by the ideas that a publication – especially in the business-to-business realm – will only be successful if it: reaches an audience that can be identified and quantified; provides unique and needed editorial information; and has a potential advertising base to provide financial support.

Just as essential, we've found over the past 25 years, are hard work, adaptability, strong customer service and a true respect for and enjoyment of the industry the magazine serves.

As we celebrate this milestone, I, along with the entire Quirk's staff, would like to thank the marketing research industry for supporting our efforts with their time, their marketing and advertising dollars and their attention and enthusiasm. We truly could not have succeeded without you.

While I love this recap, it does not tell the whole story of who Tom Quirk is – and, by extension, who Quirk's is.

The true Tom Quirk is found in what he did for others.

Nearly every employee Tom hired at Quirk's had either little or no experience, including myself. Tom was always willing to give someone a chance in life if he felt they were willing to work hard. He believed in on-the-job training and giving employees the freedom to create their roles, better themselves and, most importantly, forgiving them when mistakes were made.

Tom would give freely of his time. He coached baseball and softball teams, was a Scout leader, taught religion classes at our church and for a short while was a mentor for students at a high school.

Money was simply not a motivator for Tom. He wanted a comfortable life for his family but needed nothing more. His true calling was to help those less fortunate, especially the children and families of Haiti. Every year, Tom would take a sizable portion of the company profits and donate them to an organization in Haiti. Over the years, he supported a boys orphanage and helped build schools, clinics and housing. After his retirement, Tom donated his entire Social Security check to less-fortunate people in Haiti and the Caribbean.

The story that best summarizes my father is this: After many years of donating to Haiti, the organization asked him to come to Haiti to see the projects he helped build. My father reluctantly went. When he arrived, they had a big ceremony for him, which he didn't like and was embarrassed by. He simply gave because he had the means and because it was the right thing to do.

While we have said our goodbyes, we, as a company, will continue to be guided by the ethics, morals and example Tom laid before us. We will continue to work hard for the marketing research industry, care for one another and give generously.

If you'd like to help continue Tom's good work, please consider a donation to the Marketing Research Education Foundation's Tom Quirk Memorial Fund: https://bit.ly/3cYDMIg

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••• online

Free career resources

Present times have challenged the way we work. Quirk's offers several free career resources that we hope will assist researchers across the industry looking to identify tools and take next steps.

- Search our job board: www.quirks.com/jobs.
- Read our latest post on Quirk's Research Careers blog for career advice: www.quirks.com/articles/type/research-careers.
- Join the discussion on our LinkedIn Group: www.linkedin.com/groups/1772348.
- Add some clout to your CV by getting published in Quirk's: www.quirks.com/pages/write-for-quirks.
- Seek free help with finding employment through Quirk's Talent: https://www.quirkstalent.com.

// E-newsworthy

Diversity in media and advertising – a balancing act
quirks.com/articles/2020/20200526-1.aspx

Are you influencing the strategic plan?
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Predicting unexpected business opportunities: a three-step approach
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// Noted Posts

Quirk's Blog

Free Idea Bank aims to help businesses react to pandemic
https://bit.ly/3drlDUk

COVID-19: Information and resources: Part 5
https://bit.ly/2BhnKv0

ARF releases creative research terms glossary
https://bit.ly/2XlZoc0

Research Industry Voices

Habits and values: thriving in the 'new normal'
https://bit.ly/3eFfZy8

Three tips for insights communicators in a crisis
https://bit.ly/2XIESlC

Preparing for an immediate, measured response
https://bit.ly/3doka0Z

Research Careers Blog

Thriving at work despite the pandemic
https://bit.ly/2ZYQWSv

Firing with compassion: Leading employees through layoffs
https://bit.ly/2Xrm8sh

Leading through the crisis: 4 steps to take now
https://bit.ly/3dulnUU

••• restaurant research

Other patrons are biggest COVID-19 concern for diners

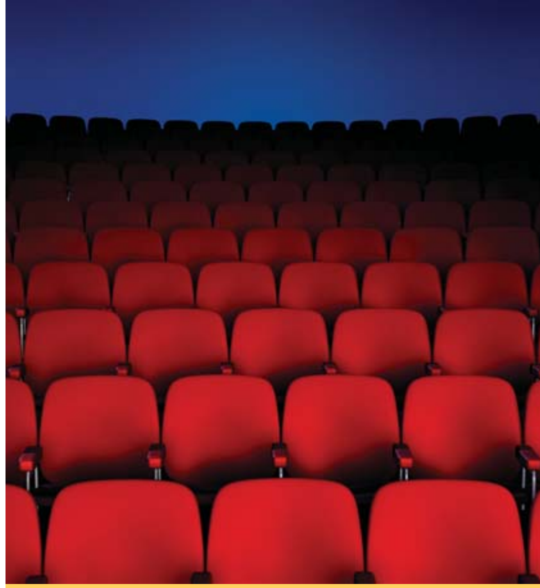
A survey conducted by Columbus, Ohio-based PR firm Inspire PR Group, with marketing research firm Illuminology, found that respondents were more concerned about distancing themselves from other diners and possibly getting sick from them than they were about contracting COVID-19 from restaurant staff.

From April 17-20, 2020, the firm surveyed 1,300 U.S. consumers and 500 Ohio consumers about their eating habits and food purchasing trends from both before and during the coronavirus stay-at-home orders and how they expect them to change after those orders are lifted.

Thirty-seven percent said they would be extremely or very worried about getting sick from other customers if they ate a meal inside a restaurant, whereas only 29 percent said they would be extremely or very worried about getting sick from employees if they ate a meal inside a restaurant.

The survey predicts that restaurant traffic will decrease about 20 percent overall from before pre-COVID levels. Consumers were most concerned about distancing from other customers: 68 percent of those surveyed said they wanted at least six feet between tables; 59 percent said they wanted restaurants to limit the amount of people allowed inside; 52 percent said they would like every employee to wear a face mask.

www.quirks.com/articles/2020/20200701.aspx



••• entertainment research

For theatregoers, the show may not go on right away

Most theatregoers will not immediately return to theatres even when they reopen, according to findings reported by American Theatre from an online survey of 2,762 Washington, D.C.-area theatregoers conducted by Shugoll Research on April 8-9, 2020, about their willingness to return to theatres in the aftermath of the coronavirus pandemic. Despite the regional specificity of the survey, the findings may be significant for the U.S. theatre field in general.

The survey found that around half (49 percent) of those questioned say they will likely wait a few months before returning. Only 25 percent think they would attend right away.

Health concerns are a bigger factor in the likelihood of respondents returning to the theatre than economic factors. Almost half (46 percent) of those surveyed are worried about how returning to the theatre might impact their health, and 42 percent of those surveyed are aware that a COVID-19 vaccine likely won't yet be available when many theatres reopen.

The existence of a vaccine was the factor most likely to increase interest in returning to the theatre, with 67 percent saying that would be decisive. In addition, 56 percent said that theatres taking steps to clean and disinfect before each performance would also help get them to consider returning to the theatre sooner than later.

By Joseph Rydholm, Quirk's Editor

Tom Quirk's lasting legacy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Joe Rydholm can be reached at joe@quirks.com

As many of you may have read or heard, Tom Quirk, founder of Quirk's Marketing Research Review, passed away in May at the age of 87. I've written in this space before about my early years ("Trade Talk: 23 years and counting," October 2011) when the magazine celebrated its 25th anniversary. And, elsewhere in this issue we are rerunning portions of Tom's 2011 article on the magazine's origin story (he retired in 2002) along with some thoughts from his son Steve, our current president and publisher, so I'm not going to cover that territory again.

But, as I have reflected on Tom's legacy in recent days, I keep coming back to his exemplary performance as an entrepreneur and small business owner. He had vision and dedication. He knew his market. He trusted his employees. He was creative and strategically nimble. He was honest and placed a great deal of emphasis on integrity. And he believed in giving back to help those less fortunate.

Like so many other small business owners, he started by seeing an opportunity in the market. Smart enough to know that he didn't know everything, he assembled a team of friends and advisors whose skill sets could help him realize his vision and produce those first issues starting in 1986.

He was frugal but he wasn't cheap. While our office furniture for years was a combination of used items, office-complex dumpster rescues (it always amazed me what businesses threw away when they moved out of a building!) and garage-sale finds, Tom understood the many efficiencies that technology offered and thus he invested early in desktop publishing and other forms of tech to maximize our productivity.

He also set an example by his work ethic. Rather than coasting in and out of the office, he was often the first one in and the last to leave each day. No task was beneath him. In the early years of creating and publishing our annual directory of research companies, each summer we had to collate thousands of listing forms and stuff them into envelopes, a process Tom enthusiastically led. And when it came time a few weeks later to phone all of the firms who hadn't sent back their forms to update their listing information, he always took the biggest stack of call sheets.

He knew that many of the research companies that advertised with Quirk's were run by entrepreneurs like him and he wanted to help them get the most from their marketing budgets so he offered advertising options with a range of price points. If people fell behind on what they owed us, he worked out payment plans, mindful of the havoc cashflow problems can cause.

But perhaps his greatest gift to his fellow business owners – and the marketing research industry as whole – was producing a magazine that was full of positive, useful and informative content about their profession.

Tom believed in the value of marketing research and knew that the more evidence of its effectiveness he could present in the magazine, the more others would be able to also see and argue for its value as well. Despite that aim, he knew that the content, while frequently pro-research, had to be as substantive as possible. From the day I started as editor he instilled in me the need to steer clear of puff pieces, as he called them, that were more focused on promoting a research company than on informing the audience of client-side researchers.

Though not vindictive and certainly always very humble, I think he took great satisfaction in the magazine's success, after being met in the early days with arrogance and skepticism from some industry leaders who felt that his magazine would never succeed. He always joked, in fact, that one of the reasons he put his last name on the magazine was that, if it didn't survive after a few years of trying, he would at least have generated some name recognition to help him secure his next job. He certainly earned that name recognition but thankfully it was for the opposite reason.

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ASK THE EXPERT

Expert answers to important research questions.

How can brands provide leadership in polarized times?

Months of sheltering in place. Fear of contracting COVID-19. Anxiety over the uncertainty.

These factors, by the end of May, fueled heated debates over the reopening of America. Just a month earlier most (54%) of Americans believed the pandemic was bringing us closer together. By May 21 this had dropped to only 40% with another 40% saying it was driving us further apart.

The division was obvious across the country, much of it along political party lines.

Then tragedy unfolded in Minneapolis on Memorial Day with the horrific death of George Floyd. The protests and social unrest that followed accelerated exposure of deep societal divisions we've yet to fully address as a people.

And these dynamics unfolded on the backdrop of another divisive presidential election cycle, cynicism and eroding trust in institutions.

This division impacts far more than politics and policy. It is shaping how people interact and engage with each other. And it is most certainly influencing market dynamics as well as attitudes and behaviors toward brands.

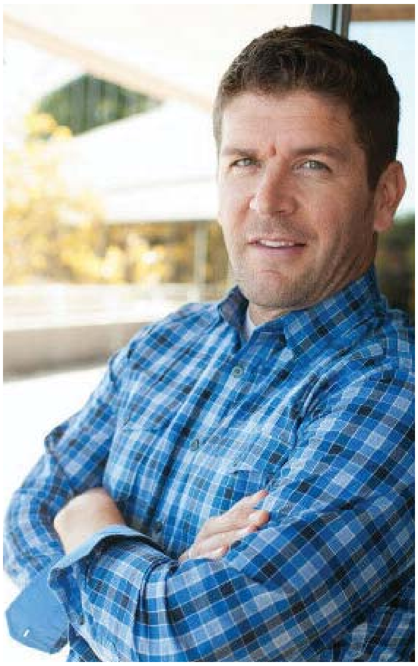
Navigating and mending this polarized reality requires leadership. It also requires innovative methods to genuinely engage people with diverse points of view. Brands can fill this leadership gap and help foster unity by finding shared values and building common frameworks.

Triadic Illumination is a specialized online approach to qualitative research developed for sensitive issues where traditional methods often prove unproductive due to social dynamics, political correctness, soundbites and safe stereotypes. And it is proving highly effective in the socially distant reality we are in during this pandemic.

The approach leverages a more personal experience of three-to-six-person groups where two opposing views are equally represented along with people who are unsure or undecided. Through a series of activities, we create an atmosphere of collaborative problem-solving for some of life's most challenging issues.

The multi-day, online discussion is structured so that participants present, react to and defend differing points of view or stories and find where they are able to agree or recognize merit in each other's views; this becomes the foundation of our resulting narrative. Multiple days with breaks give participants time to reflect and refine their arguments and point of view.

These sessions conclude with participants summarizing points of common ground between opposing sides. The result? We provide the team with a clear framework and language for building and fostering understanding and interactivity on divisive topics.



Maury Giles
Partner
Heart + Mind
mgiles@heartandmindstrategies.com

HEART+MIND STRATEGIES

Brand leaders in today's market will address, and even mend, societal divisions by taking a position on the issues that truly matter. To do so, they must engage people with opposing views and leverage civil dialogue and empathy to find common ground. Triadic Illumination is an innovative method to facilitate this market need today.

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/2020/20200755.aspx

QUIRK'S Hot List

Meet some of the companies, people and products that are driving the marketing research industry forward! They are the influencers in the industry, finding new ways to innovate and constantly pushing research and insights to be better and faster.

QUIRK'S Hot List

In-person or mobile qual, quant and hybrid research

CAROLINE ROE, DIRECTOR OF QUANTITATIVE RESEARCH, INSIGHTS IN MARKETING

Insights In Marketing partners with people who manage brands and we listen to the people who buy them. Our quantitative guru, Caroline Roe, honed her superpowers connecting people to iconic global brands and now she empowers our clients to connect with more consumers.

Calling Caroline curious is an understatement – and people love talking to her. She has the intuition to ask the right questions and dig deeper to connect the dots between data and people's emotions. Using an innovative blend of qualitative and quantitative research, Caroline customizes solutions for each client and leads remote, online or in-person sessions.

Whether it's a quick-turn project or a long-term partnership, clients discover surprises about who their customers should be and what people love – or don't love – about their brands, concepts, marketing and positioning. At the end of the day, Caroline's clients feel confident and make the best decisions possible for their brands.

Ready to connect with your consumers? Let's talk!

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3. PrecisionSMS uses multiple sample methodologies including sample stratification. Our samples also include a propensity score (quality of phone number and matched at individual or household level). That is, we are only using the mobile phone numbers most likely to connect and respond.

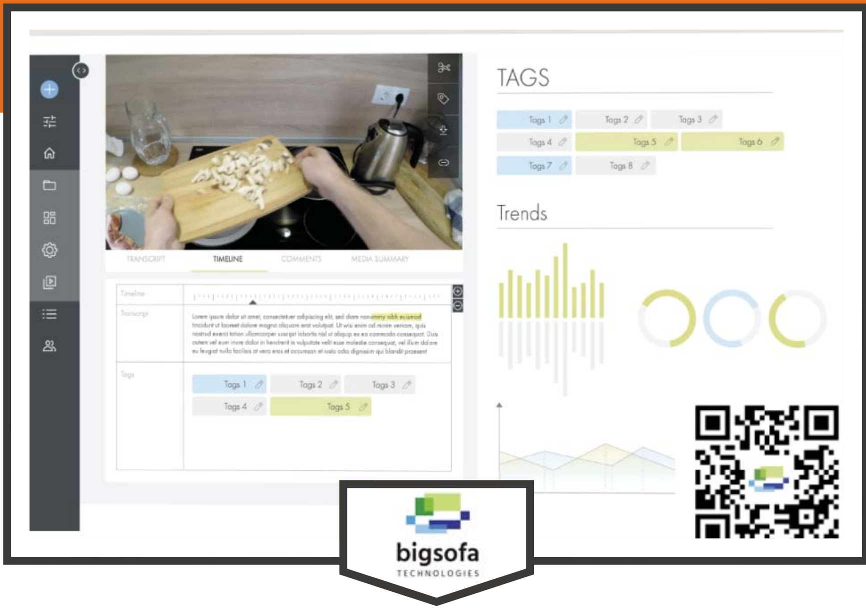
4. Clients can use their own sample and online survey.

5. PrecisionSMS delivers responses even in populations as small as 20,000.

6. PrecisionSMS can append voter records and other data sets to the data output.

7. Due to the high response and contact rate, PrecisionSMS produces a more representative sample than an online sample.

Tired of not being able to reach target audiences? Looking to tap into untouched respondents for insights? PrecisionSMS will surprise you with all that it offers. Contact us at sales@PrecisionOpinion.com.



Consumer intelligence specialist

BIG SOFA TECHNOLOGIES

The value of video in research has moved beyond question and response – it is the new frontier for authentic behavioral data.

Big Sofa has been on a journey during the last 12 months, building a pioneering video technology system that helps leading brands capture and understand authentic consumer behaviors and experiences.

Brands are increasingly using Big Sofa to channel consumer lives – capturing behavior in the places and spaces it naturally occurs. Fusing together analytics, evidence and empathy, our video technology turns human stories into hard data to build better products and companies.

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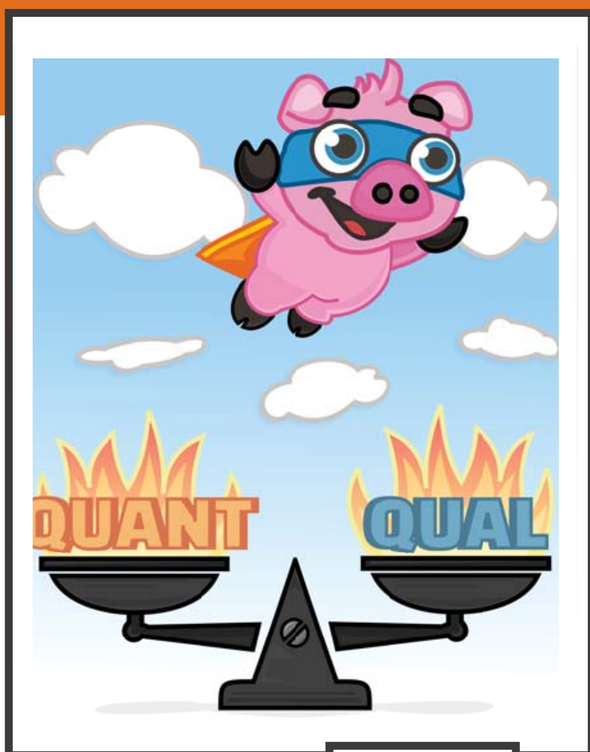
Quant/qual hybrid research technology

JIBUNU

Are you prepared for the "new normal" of market research? Social distancing and stay-at-home orders created an increased and faster shift toward online research. Even after things go back to "normal," the trend toward online research will continue. Jibunu's proprietary tools enable you to conduct both online quant and qual projects – or a hybrid of the two – without needing to use multiple vendors. Some of Jibunu's offerings include survey programming, online bulletin/discussion boards, video responses/journals, virtual shopping, image/concept markup, online collage building, secure content hosting, IDI screening/scheduling and custom tool development.

Your problems are not one-size-fits-all, so why settle for a one-size-fits-all product? Jibunu's suite of market research tools and services are customizable, so you never have to say, "I wish we could do that." If you're looking to find or create a solution that checks all your boxes, contact Jibunu and together you'll make pigs fly!



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QUIRK'S **Hot List**

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••• health and beauty research

All made-up

COVID-19 is changing beauty routines

Opinium surveyed Americans to learn about the changing nature of beauty in society and look at how beauty brands can adapt to survive lockdown. The research revealed that a quarter of Americans (25%) are wearing less color cosmetics (foundation, blush, lipstick, eyeshadow) in lockdown. Of those who are using makeup less often, over a third (35%) feel relieved that they don't have to wear it anymore, while 39% are enjoying feeling like a more natural version of themselves. Fifteen percent of Americans expect to continue wearing less makeup, suggesting a potential longer-term impact on beauty standards. However, not everyone appreciates the option to follow lower-maintenance beauty routines – a smaller number (28%) miss wearing cosmetics and a fifth (21%) say they don't feel like themselves when not wearing them.

More than two-in-five Americans (44%) wearing cosmetics in lockdown are doing so as a form of self-care during a difficult time. Older cosmetics users (those aged 55 and older) are more likely to be applying cosmetics during lockdown for this reason – 49% compared to 38% of younger Americans aged 18-34 years.

Beauty products are also serving as an affordable way for consumers to "treat themselves" during lockdown, with nearly a quarter (23%) revealing that they have treated themselves to higher-end or luxury beauty products while at home more.

While cosmetic use has declined, skin and haircare products have seen an increase in usage during the lockdown period. Three-in-10 (29%) are using skincare products more and a quarter (25%) are using haircare products more. A fifth (20%) report that they've been following longer and more elaborate skincare routines during lockdown and over a quarter (28%) are using more face masks. Similarly, a fifth (20%) are using more hair treatments.

So, how can beauty brands and salons adapt to the new market? Heavy cosmetic users are interested in signing up to membership schemes with their favorite beauty brands. When asked how beauty brands and salons could engage with them during social distancing, the most popular response (28%) was a membership service. Such schemes could include a monthly fee that can be put towards purchasing items and gives access to exclusive content in lockdown, as well as access to exclusive items once restrictions are lifted.

A third (34%) of Americans who typically get their hair colored at a salon are planning to or have already colored their own hair during the lockdown. As a result, there is a market for DIY tutorials. Americans who would normally go to the hair salon are somewhat interested in watching how-to videos for different hair styles (17%). This percentage is higher among men (20% vs. 14% of women) and young people (27%). Similarly, men are twice as likely as women to express interest in personal consultations (17% vs. 9%) and video chat assistance to guide them through cutting their hair at home (16% vs 8%).

www.quirks.com/articles/2020/20200703.aspx

Fourteen percent of salon customers under lockdown would be interested in buying vouchers for future services, with this increasing to 18% of men and 18% of those aged 18-34.

The survey was conducted by Opinium Research and polled 2,000 U.S. adults from April 9-15, 2020.

••• shopper insights

How to make a 'regular'

Employees are key in earning, keeping professional-service customers

DaySmart Software wanted to know what consumers prioritize when finding their go-to professional service providers – specifically in the hair and nail, pet service (pet groomers, spas, kennels, daycares), spa and tattoo industries. In February 2020 – prior to the escalation of COVID-19 – DaySmart polled 2,000 U.S. consumers who had visited these types of businesses in the last year. The study revealed that consumers place heavy emphasis on small business employees and personalized service when choosing where to spend their money regularly.

Amidst the COVID-19 crisis, small businesses across the U.S. have been forced to close and – as much as possible – operate remotely. As those businesses reopen, they'll need to be creative and strategic to reengage their customer bases and foster loyalty amongst prospects. In order to regain that relationship with clients, business owners and managers will need to put an emphasis on bolstering the quality of the services they are providing. Sixty-two percent of consumers believe quality of service is the most important trait when identifying their go-to businesses. This is followed by cost (40%), convenience (32%) and reputation (32%). Once the customer starts feeling comfortable at their chosen businesses, more than half (51%) say that it takes 10 visits or fewer for them to consider themselves a regular.

Employees play a vital role in garnering customer loyalty. Findings show that 67% of consumers are more likely to be loyal to a particular employee rather than the overall business. Further, 48% say they would follow an employee from a business they were a regular at if they moved to a new business. As employees prove to be a small businesses' biggest asset, owners will need to emphasize their value by providing them with the resources needed to succeed.

It is no surprise that the stakes are high when it comes to both quality of service and employee-customer interactions. Findings show that 60% of consumers would never go to a business again if that business ruined the service they went there for (e.g., haircut, manicure, tattoo). Moreover, 50% say they would never go back if an employee was rude to them and more than three-quarters (77%) of consumers are less likely to visit a business again after receiving bad customer service. Clearly, consumers think a lot about who their go-to professional service providers will be – and the choices are not taken lightly. According to the survey findings, consumers are pickier when it comes to finding a hairdresser or barber who they are comfortable with than a doctor. They are also pickier when choosing a pet kennel or daycare than a babysitter or nanny.

Convenience plays a role as well; 74% of respondents are more likely to continue visiting a business if they can utilize online resources to book appointments – a percentage that jumps to 81% for consumers between ages 18-23 and 79% for consumers between ages 24-39.

The research was conducted by OnePoll on behalf of DaySmart Software and surveyed 2,000 U.S. consumers in February 2020. Respondents were adults who had visited one of the following businesses at least once within the past year: hair salon, nail salon, spa, groomers, pet spa, pet services or tattoo parlor.

••• customer experience

All in the journey

Organizations with journey-based approach have CX success

In its 2020 State of Customer Journey Management and CX Measurement report, Pointillist surveyed over 1,050 CX, analytics, customer care and marketing professionals from a variety of industries across the world to understand what makes some organizations more effective than others at managing customer journeys, measuring outcomes and improving experiences.

According to a Pointillist article by Stephanie Ventura, respondents were categorized into three segments based upon overall satisfaction with their organization's CX performance and outcomes of their investments. Twenty-six percent of organizations were categorized as "underperformers," where respondents where not at all or not so satisfied with their organizations' overall CX performance and the outcomes of their CX investments. Forty-eight percent of organizations were "average performers," with respondents somewhat satisfied with these functions and 26% were "high performers" – very or extremely satisfied with their organizations' overall CX performance and the outcomes of their CX investments.

So, what sets the high performers apart from the rest? High-performing organizations rely on a journey-based approach to effectively manage and measure CX and maximize business results.

Over 95% of organizations have adopted a journey-based approach to CX and 79% of respondents say a journey-based strategy is critical to the overall success of their business. Over 50% of companies also have a role or team dedicated to journey management or journey analytics. High-performing teams are more likely to use this approach than underperforming teams, as 92% believe it is very or extremely important to their overall success. The majority of high performers (70%) have a role or team dedicated to journey management, compared to 31% of underperformers.

Leading organizations are leveraging a journey-based approach in a wide variety of ways to better acquire, serve and retain customers. However, high performers adopt a journey management approach to measure and improve CX and business results more broadly than underperformers.

On average, high-performing teams apply this approach to 6.4 different areas of CX, compared to underperformers who apply this approach in 4.6 different ways. Over half of all top performers use a journey-based approach to identify and prioritize opportunities to improve CX; understand customer goals, needs and preferences; improve product or service design and delivery; personalize cross-channel engagement; identify the root cause of CX issues; and deliver relevant communications at the right time through the preferred channel.

High performers are seven to eight times more likely than underperformers to be effective at integrating data into a single view of the customer, analyzing customer interactions across channels and engaging customers with personalized cross-channel experiences.

On average, underperformers struggle with siloed data more consistently than high performers. In fact, underperformers are 3.6 times more likely than high performers to lack access to cross-channel journey data. Data is inaccessible or siloed by business function, which impedes their ability to build a unified customer view.

High performers are more likely to have access to journey data and use it to drive CX programs and initiatives. Nearly one-in-three high-performing CX organizations say their cross-channel customer data is accessible, integrated into a unified view of the customer and an integral driver of CX programs and initiatives, while only about 3% of underperformers can say the same. They are also seven times more likely than underperformers to be very or extremely satisfied with their ability to rapidly generate insights they can act on. Almost half (49.7%) of underperformers cannot access data or say that it is siloed within channels.

Top performers are much more likely to connect behavioral data across three or more channels. Effective data integration supports their ability to rapidly analyze journey data, generate insights and orchestrate actions to improve customer experiences. In fact, high performers are 9.7 times more likely than underperformers to be able to connect customer data in each channel with three or more other channels.

The research was conducted by Pointillist and surveyed 1,050 CX, analytics and marketing professionals.

••• small business

Giving back

Small businesses see ROI in (re)investing in their communities

According to seedership's Spring into Kindness Small Business Study, small businesses view what they give back to their communities as an investment (60%) and important to their business' growth (70%), but underestimate the full value of their donations and the competitive advantage they could gain.

Nearly all (99%) of small businesses gave back to their communities within the past year and 93% have plans to also give in 2020. Additionally, more than two-thirds (70%) gave consistently throughout the year, with 87% asked to donate at least once a month. Most (97%) prefer to give to local causes and nonprofits.

For the majority of small businesses (60%), giving is considered an investment in their business versus a trade-off or expense, with 70% stating community giving is important to their growth. Sixty-nine percent stated that their primary return on investment from giving is their personal satisfaction from supporting their communities, followed by 68% measuring ROI by the ability to create a benefit in their communities. Three-quarters (75%) want to increase their community giving, while approximately half cite that the lack of available finances (50%) and time (46%) prevents them from doing so.

The small businesses surveyed give back to their communities in multiple ways, with money being the primary (75%) method, followed by volunteering their time (62%), items gathered in collection drives (58%) and in-kind donations (35%). While almost all (95%) track their community giving, most track the monetary value of what they give – either as money donated (73%) or money raised (30%) – leaving a hazier picture around other giving components, such as time and items. Three-quarters stated that they could promote their community giving more effectively, citing that the most common methods they utilize to drive awareness of their efforts are word of mouth (69%) and Facebook (67%).

The researched was conducted by Drive Research on behalf of seedership and surveyed 403 small businesses in the U.S.

••• customer service

Hold, please

COVID-19 tests customer and employee care

In its research report The Impact of COVID-19 on Customer Care Response and Remote Work, LivePerson examined various aspects of consumer sentiment around how brands responded to the COVID-19 pandemic and how employers implemented remote working.

Sixty-eight percent of consumers reported feeling frustrated over their inability to reach a company when needed, with 20% saying some brands they tried to contact were completely unreachable.

Worldwide, long hold times on the phone (experienced by 76% of respondents) were identified as the primary challenge preventing consumers from getting in touch with brands as the crisis hit. Further, 29% reported they were never able to make contact over the phone. Eighty-nine percent of the group reporting long hold times faced waits of over an hour, with 15% reporting waits of over two hours.

More than half (51%) of respondents said COVID-19 changed how they will think about ways to communicate with companies in the future. Just 37% of consumers said that the companies they were unable to reach provided a chat or messaging option. Almost half of respondents worldwide (45%) say the implementation of messaging and chat would have helped answer their questions and reduce their anxiety.

It was critical for consumers to reach businesses essential to their lives during COVID-19, yet many respondents found industries to be "not accessible" or "not helpful." Health and medical-related companies were most important for consumers to first contact as the implications of COVID-19 garnered awareness in the news or through other channels. No industry cited in the survey – retail, financial institutions, medical/health/insurance, travel/hospitality – was deemed "very easy" to reach, with 7% being the highest response. The alcohol, cannabis and pet industries were considered the "most accessible," with women edging men in this sentiment by 16% and 6%, respectively. The alcohol, cannabis and pet industries were also deemed the "most helpful," potentially showing a connection between how quickly a brand responds and how helpful that response is perceived to be by the customer.

Some overlap might exist in the way the COVID-19 crisis stressed customer care and the way in which employers implemented remote working. Eighty-seven percent of respondents reported feeling just as productive or more productive while working from home and would like to see work-from-home-friendly policies implemented at their jobs. In fact, 74% would like their company to allow greater flexibility to work from home even after shelter-in-place policies expire. However, not all employers are willing to implement remote work policies going forward, and 66% of respondents who said their employers weren't prepared to assist in working from home situations cited technology issues or a lack of technology and tools as the primary impediments. Technology shortcomings have become clearly visible with the crisis, with 78% of technology decision-makers agreeing that their company's use of technology will change in the future as a result of COVID-19. Additionally, 74% of HR decision-makers anticipate their company's work-from-home policies will also change as a result of the pandemic.

The research was conducted by LivePerson and surveyed 5,510 adults in the U.S., U.K., France, Germany, Australia and Israel in April 2020.

••• lifestyle research

BBQing is hot

U.S. consumers look forward to grilling

With consumers home now more than ever, research by the Hearth, Patio & Barbecue Association suggests that our increased home cooking will expand to the backyard at near-record levels.

The survey was fielded before the COVID-19 outbreak and at the time, 37% of grill owners were looking to purchase a new grill in the near future. This number may yet hold up with the opening of businesses again. Almost two-thirds (64%) of U.S. adults own a grill or smoker. More than seven-in-10 (72%) Canadian adults own a grill or smoker.

Sixty-eight percent of American grill owners plan to cook out on the Fourth of July. The next most popular grilling days are Memorial Day (56%), Labor Day (56%), Father's Day (42%) and Mother's Day (29%). Year-round grilling also remains highly popular, with 75% of grill-owners saying that they grill in the winter. Twenty-three percent grill on Super Bowl Sunday, as well as 13% on Thanksgiving and 9% on New Year's Day. In addition to holidays, owners over the past year cooked out for a birthday party (45%), during a camping trip (19%), while on vacation (17%) and tailgating at a sporting event (10%).

Gas remains the most popular fuel, with 61% of grill owners using propane, followed by charcoal (49%), which has increased slightly since 2017 (45%). Ten percent of owners have an electric grill, 9% have a natural gas grill and 3% have a wood pellet grill.

Why do people grill? Sixty-eight percent of owners do it for the flavor, followed by lifestyle (45%), convenience (33%), entertainment (32%) and hobby (19%). Grill purchasers continue to prefer choosing a grill in person, with 83% of grills purchased in-store but only 15% online. One-in-10 grillers have a full outdoor kitchen and 56% of these individuals use that kitchen at least once a week.

The HPBA State of the Barbecue Industry Report was conducted by Rockbridge Associates Inc. in August 2019 with a panel of grillers who were at least 18.

••• travel research

The outdoors are in

Camping is likely re-entry point after restrictions lift

The COVID-19 edition of the North American Camping report reveals that camping is well-positioned to rebound from the effects of COVID-19 earlier than other types of travel. Of those that made camping plans for 2020, 41% still plan to take their trips, while 22% of respondents said they cancelled and 13% say they postponed their plans. Camping and road trips will likely be the re-entry point for a third of leisure travelers. In fact, nearly half of leisure travelers who camp say they will replace one of their cancelled or postponed trips with a camping trip (47%). Travelers who don't camp say they will replace a cancelled or postponed trip with a road trip or a hotel/resort trip (34% each). Among all leisure travelers, prior to the pandemic, camping accounted for 11% of all trips while post COVID-19, camping is likely to account for 16%.

When asked how long it will be before they go camping after restrictions in their area are lifted, 21% of campers said they felt safe camping at the time of the survey, while the majority (54%) said they'd feel comfortable within one-to-two months.

However, not all campers are confident in their ability to get back into the outdoors, citing work status (33%) and finances (26%) as top barriers to their ability to camp, or camp more, once restrictions are lifted. Those looking to camp have many reasons to go, though, with the top reasons being that campers are wanting to spend time outdoors after staying home for so long (46%); camping is an affordable way to travel (41%); and it's easier to practice social distancing, compared to other types of travel (37%).

There has been an influx of new, younger campers to the market in recent years, a trend tracked annually by KOA's North American Camping Report, and COVID-19 could accelerate the rate of adoption among young people trying camping. The highest level of interest among prospective new campers is among Gen Z (44%) and millennials (45%). Prospective campers say if they were to try camping, they are most interested in a cabin (41%); in fact, roughly, 36% specifically cited a full-service cabin with a bathroom. Preference for trying a cabin is followed by a tent (21%) and an RV (19%). Campers say they are likely going to camp with fewer people compared to last year with 31% planning to camp with two people (compared to 25% in 2019) and 36% planning to camp with three to five people (compared to 41% last year). These results suggest that those who stayed in groups of three-to-five in 2019 plan to decrease their group size.

A full 70% of campers say they plan to camp closer to home than they did before COVID-19. Many campers (68%) also say they are more willing to travel to less-popular locations in order to avoid overcrowding in places such as national parks or national monuments.

Campers are now more likely to consider different types of camping experiences and accommodations. In fact, four in 10 campers say they are interested in becoming a full-time RVer, trying glamping or trying a backcountry experience. Not surprisingly, prospective campers are less certain which type of experience they are interested in trying, though nearly one-in-three are interested in trying glamping.

Campers and prospective campers say they are also now more likely to consider different types of accommodations, compared to pre-COVID-19:

Nearly half of current tent campers and one-in-three prospective campers are now more likely to try a full-service cabin with a bathroom. About half of people who currently camp in cabins or tents, and a quarter of prospective campers, are now more likely to consider RVing. Nearly half of people who currently camp in cabins or tents and 23% of prospective campers are now more likely to consider a glamping type of accommodation. Half of current cabin campers say they are more likely to consider tent camping.

With concerns over the safety of communal facilities spiking from COVID-19, having a private bathroom in a cabin or RV is now very important to campers (63% of current campers and 44% of prospective campers). About half of campers and prospective campers say the availability of private bathrooms in a cabin or RV will influence where they stay. In fact, more than half of campers (52%) say that they are now either somewhat (29%) or very likely (23%) to consider purchasing an RV. Interest is highest among Gen X (41%) and Millennials (33%). Cleanliness of accommodations at hotels or resorts is the primary factor driving this interest, as campers want to avoid communal facilities.

The study was conducted by Cairn Consulting Group on behalf of Kampgrounds of America and surveyed 4,000 American and 500 Canadian households.

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Nominations close July 29.

… of marketing research!

Assessing a brand funnel using comparative discriminant analysis

| By Michael Lieberman

snapshot

Michael Lieberman uses a steakhouse case study to illustrate how to use results from a quarterly tracker to improve brand relationships.

Traditional brand funnels assess consumers' brand awareness, consideration, purchase, repeat purchases or favorite brand and loyalty. Their name comes from their nature – as the total number of consumers enter a brand funnel, the size of the pool of consumers narrows as they progress through it.

The goal of most brand funnels is to describe the different stages of a customer's relationship with a brand. Here is a fairly typical brand funnel:

Awareness: Potential customers have heard about or come in contact with a brand.

Consideration: A potential customer develops a deeper relationship with a brand and seeks more information about it.

Purchase: The prospect now becomes a customer trialing a product of the brand.

Repeat purchase or favorite: The customer likes the brand or product and decides to purchase the brand again.

Loyalty: The customer only purchases that specific brand. If the brand is unavailable at a store they will seek it out elsewhere.

Within the framework of the brand funnel model initial research is to segment customers into a funnel, then research the best methods to move customers down the brand funnel. I have worked on these sorts of projects for 20 years in industries as variable as CPG, pharmaceuticals, electronics and the food-service industry and one technique I've found to be particularly effective is to lay out a road map to guide customers down the brand funnel. It is not predicated on one plan to move them in one fell swoop but rather individual guides to move them down one step at a time. The method I use is called comparative discriminant analysis and this article will give a simple, step-by-step template using a fictional casual-dining restaurant, Texas Grill Steakhouse, as a case study.

www.quirks.com/articles/2020/20200704.aspx

Case study: Texas Grill

Texas Grill is a national chain of steak-featured entrees that can found in many malls and shopping centers across the United States. Texas Grill competes for dining dollars with other major casual-dining chains such as Applebee's, Olive Garden, Chili's, Red Lobster, Hooters, LongHorn Steakhouse and TGI Fridays.

Figure 1 is an example of a Texas Grill customer pyramid. Customers are placed into each category by a segmentation back-classification screener. The study is conducted quarterly and, thus, each level of the pyramid is populated.

The quarterly report produces a research deck that follows a planned measure of metrics and analysis of key drivers, Texas Grill brand equity, social media analysis, pricing and measurement of menu item purchase. This quarter, though, the management at Texas Grill corporate headquarters would like to know how to move Texas Grill customers down their brand funnel. That is, from aware to consider, from consider to purchase, etc. Most importantly, from repeat to promoter.

Discriminant analysis is an a priori

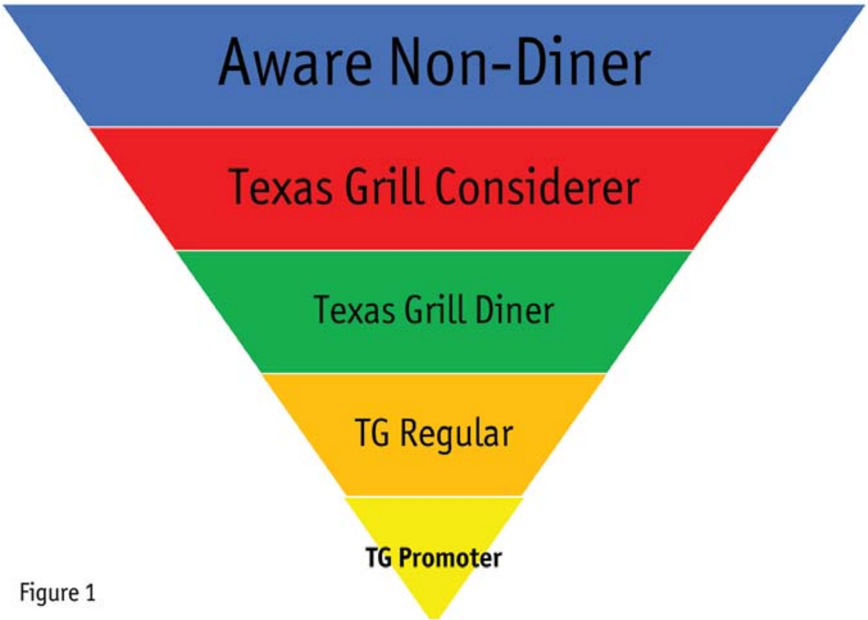

Figure 1

statistical technique – that is, the groups or dependent variables are predefined. The first requirement, then, is the groups. You need to have the groups defined. Multiple discriminant analysis, from which discriminant maps are drawn, is a case where you have membership from more than one group to define.

Characteristics of the grouping variable are simple. They are distinct, mutually exclusive and exhaustive. In the case of Texas Grill, we are looking within each level of the pyramid to define membership.

The target, or dependent variables, are constructed like this. For the first discriminant level, we begin with the aware category. All respondents in the survey have to be aware of Texas Grill, so the sample size in the first category is 1,000. However, as we move down the funnel, the sample size of the analysis shrinks to those customers who are in the next level.

Table 1 illustrates the dependent variables and their respective sample sizes.

As we can see, the base sizes shrink as we descend the pyramid. In the first level, those who are aware, but not "Texas Grill consider" are coded a 0. Those who are "Texas Grill consider" are coded a 1.

In the next level, only those who are Texas Grill consider (700) are included in the analysis. Texas Grill diners = 1 (500), non-Texas Grill diners = 0 (200). And so on down the pyramid. Given that we have five levels of pyramid, we are looking at four separate discriminant analyses.

What gives the comparative discriminant analysis such power is its ability to use many parts of the survey to determine what motivates customers to move down the brand funnel. And for each level, we are looking at, essentially, a new analysis. This is a roadmap that gives not one set of directions but, in our case, four.

It is not unusual to use six or seven different sections of the survey in a roadmap analysis. However, to illustrate things we will simplify our analysis for Texas Grill and keep it to four brand arrays.

For Texas Grill, we are going to look at the following restaurant survey sections to determine how to move down the brand funnel: primary reasons for visiting Texas Grill; favorite Texas Grill menu items; rating the Texas Grill dining experience; negative statement about Texas Grill – brand barriers.

On the Texas Grill quarterly tracker, Texas Grill asks respondents 21 primary reasons they visit Texas Grill and other casual-dining restaurants. Let's say that Texas Grill has 30 main items on its menu. Respondents are then asked to rate Texas Grill on 15 dining experience questions. Finally, respondents are asked if any of a list of 14 negative statements apply to their last Texas Grill visit.

Table 2 shows how, for each item, performance rating and barrier we are creating a new variable. These variables are coded 1/0. If a respondent ordered an item, that item variable gets a 1, if not, a 0. If a respondent agrees with a statement about Texas Grill, the variable gets a 1, otherwise a 0. If a barrier, a 0, otherwise a 1. The variables created are summarized in the table.

There are four categories shown in the table. Thus we run four discriminant analyses for each level of the brand funnel – that is, we are running 16 analyses in total.

This technique is labeled a comparative discriminant analysis because we run the same analysis for all levels of the brand funnel. The one aspect that changes is the dependent

Table 1

	Base Size	Aware Non-Diner	Texas Grill Consider
Level 1	1,000	300	700
	Base Size	Texas Grill Consider	Texas Grill Diner
Level 2	700	200	500
	Base Size	Texas Grill Diner	TG Regular
Level 3	500	100	400
	Base Size	TG Regular	Promoter
Level 4	400	250	150

Table 2

	Number of Items/ Attributes	Number of Variables
Primary Reasons for Visiting Texas Grill	21	21
Favorite Texas Grill Menu Items	30	30
Rating the Texas Grill Dining Experience	15	15
Negative Statement about Texas Grill – Brand Barriers	14	14

Table 3

Outstanding Texas Grill Restaurant Ratings	
TG Promoter=1, TG Regular=0	Discriminant Coefficients
The food is served hot and fresh	0.47
The barbecue/steak was tasty and flavorful	0.31
I was served promptly	0.31
The food is a good value for the dollar	0.28
The service is excellent	0.17
The quality of food is excellent	0.16
The menu has a good variety of items	0.14
Employees are friendly and courteous	0.13
My food order was correct and complete	0.12
I was warmly greeted at the door by the hostess	0.12
I enjoyed the complimentary corn bread	0.11
I enjoyed the supervised garage and playground for kids	0.09
Availability of sauces, utensils, napkins, etc., was good	0.07
The side dishes complemented the entrée	0.03
The manager personally thanked me	0.03

Table 4

Primary reasons for visiting Texas Grill
A casual and relaxed dining-out experience
A satisfying meal and side dishes
A big meat-loving restaurant
Favorite Texas Grill Menu Items
Slow-Smoked Texas Brisket
Texas Grill Texas-Sized Sirloin
TG Spicy Ribs
Outanding Texas Grill Attributes
The food is served hot and fresh
The barbecue/steak was tasty and flavorful
I was served promptly
The food is a good value for the dollar
Possible Barriers to Funnel Promotion
They don't have enough healthy menu options
They don't have any appealing promotions
It is not family-friendly

variable as you work down the funnel. In this way, we are able to say which items, which performance and which barriers drive the respondent from one level to the next. We are, in effect, creating a roadmap.

To display the output for each level of the analysis would take up too much room. Table 3 is an example of how the discriminant analysis statistical output might look.

The simple interpretation of this table is that the top four attributes are discriminators between customers who are promoters of Texas Grill and those who are merely TG regulars. While the output of this chart may seem self-evident, it shows that an emphasis on prompt service and value can turn a regular diner into a word-of-mouth promoter of the restaurant.

The final step in this analysis is to summarize the discriminators across the four survey areas we used in the comparative discriminant analyses. We are showing, in Table 4, the discriminators between TG promoters and TG repeaters.

From this summarized table we know dining expectations, menu items, restaurant attributes and possible barriers to guide diners to the next level of Texas Grill brand funnel. Remember, with this analysis we produce four of these summary tables, one for each path of the brand funnel.

Remain relevant

Comparative discriminant analysis is one of several useful, agile methods that have been around since the invention of mathematics yet remain relevant options for today's branding strategy needs. Marketers have access to more and more data but in order to mine actionable data insights, like how to move diners through a brand funnel, they can rely on researchers and data strategists who are skilled in applying the right tools to guide their clients.

Michael Lieberman is founder and president of Multivariate Solutions, a statistical and marketing research consulting company based in New York. He can be reached at michael@mvsolution.com.

Melanie Courtright of Insights Association

Melanie Courtright, CEO, Insights Association, discusses the changes caused by the COVID-19 crisis and the important role data has in helping us all move forward.

- https://bit.ly/3fF1nzA

OTHER RECENT GUESTS...

Cathy Wray of MassMutual

Cathy Wray, director of client lab at MassMutual, chats about the work she is doing around financial wellness and how financial services is evolving – both in general and now during a global crisis.

- https://bit.ly/3eqXj5P

Susan Fader of Fader and Associates

Susan Fader of Fader and Associates shares why scheduled Zoom meetings and passive entertainment are not providing true social interaction and explains how social intimacy can be found through small online gatherings.

- https://bit.ly/2YfF6T4

Mark Bentley of Molson Coors

Mark Bentley, on-trade category controller, Molson Coors, discusses the industry's plans regarding trade, reopening and the steps to doing so safely and successfully and why consumer confidence is going to be so important.

- https://bit.ly/2NawtCI

QUIRK'S WEBINARS

What Global Consumer Trends Can Tell Us About The 'New Normal'

Dynata's Jackie Lorch looks at how global consumer attitudes and behaviors have evolved in response to the COVID-19 pandemic and shaped the "new normal."

- https://bit.ly/2ClMrYD

Now, Next, Future ... Navigating Your Business To A New Normal

Ignite360 and delineate share insights and recommendations from their integrated qual/quant longitudinal U.S.-based study of consumers.

- https://bit.ly/3fzx6Sz

'Better For You' Foods: Digesting the Latest Consumer Trend

GutCheck explores findings from its survey of 7,000 consumers to gain a better understanding of their perceptions and behavior regarding healthy food and beverage choices.

- https://bit.ly/3fA0G8H

Using Online Qualitative to Navigate Changing Consumer Needs

Digsite CEO Monika Wingate discusses the unique challenges of conducting qualitative during COVID-19 and gives recommendations on dos and don'ts for doing research during the pandemic.

- https://bit.ly/3fGuRNr

special advertising section

21 TOP CONSUMER RESEARCH COMPANIES

Consumers are constantly changing, and as the world changes in response to the pandemic, this becomes especially apparent. As brands continue to try to reach their consumers, companies that specialize in consumer research are well-positioned to help them develop the best strategy to do so.

The following companies employ a wide array of techniques to reach target audiences. From online surveys and telephone interviews to in-home usage testing and focus groups, these companies are equipped with both qualitative and quantitative methodologies to meet your research needs.

quirks.com/articles/2020/20200733.aspx

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Founded 2011
Steven Czyrny, President

The Analyst Agency is an operations and strategic consulting firm that provides comprehensive qualitative and quantitative market research, business analysis and technology advisory services. Our expertise is unique in that we can not only help with complex consumer and business intelligence, but also give you the resources to enhance your operations after discovery. The Analyst

Agency has worked with advertising agencies, business-to-business enterprises, financial institutions, health care companies, real estate developers, law firms and more to help with their market research needs and beyond.

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www.TheAnalystAgency.com

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Founded 2001 | 30 employees
Lisa McGurk, Vice President

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www.blue-berry.com

Branded Research Inc.

Founded 2012 | 35 employees
Matt Gaffney, CEO

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gobranded.com

CarterJMRN K.K.

Japan Market Resource Network

Founded 1989 | 80 employees
Dominic Carter, CEO

With offices in Tokyo, Osaka and Singapore, since 1989 CarterJMRN has helped major international brands across a wide range of industries (i.e., food and beverage, skin care, insurance, payment systems, destination tourism, airlines, automobiles, health care and medical, gaming and entertainment). With deep roots in specialist qualitative work, we lay the foundation for more detailed marketing activities in Japan with immersive qualitative and quantitative research approaches (i.e., cultural analysis, semiotics, desk research, depth interviews, ethnography, focus groups and quantitative survey methods). We are your guide to unmasking the needs, desires and opinions of Japanese consumers and helping you translate those into action. Please contact us at d.howard@the-carter-group.com to learn more!

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www.carterjmrn.com

Creative Consumer Research

Founded 1976 | 13 full-time; 70 part-time (83) employees
Patricia Pratt, CEO

Creative Consumer Research (CCR) is the most respected market research and consumer insights firm, providing accurate and actionable data for better business decisions. Using proven techniques, we work with a variety of industries including B2B, health care, consumer goods and more. If your business requires bilingual research, we proudly staff a team of experienced market researchers fluent in spoken and written English, Spanish, Vietnamese, Chinese, Farsi and more. Whether your focus is on the United States or abroad, CCR can program and host your surveys online, whether you need pre-screeners or even a combination of telephone and web interviewing. Our resources allow us to thoroughly conduct studies quickly and inexpensively – no matter what the size. Maximize your business with the CCR market research and consumer insights team.

Phone 1-281-240-9646
www.ccrsurveys.com

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 only what products consumers prefer, but 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™.

Phone 1-224-632-1919
curioninsights.com

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Frieden Qualitative Services

Founded 1984
Gary Frieden, CEO

Years of expertise conducting safe online (webcam) and telephone qualitative studies (as well as in-person after the "all clear")! Why does one advertising campaign succeed over another? Why doesn't a particular execution convey your message? How can it be improved? How can your audience better relate? We go after these questions (and more) and get you the answers! We know advertising. Gary Frieden, Ph.D., has been conducting superlative advertising research for over two decades. After presenting his special techniques at a major conference, Gary heard that he "woke up the convention!" Frieden's work is dynamic in scope. His combination of psychology and marketing research provides you the nuggets you're seeking. His methods are incisive, thereby producing the underlying motivational responses you need. Let's chat!

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www.garyfrieden.com

Full Circle Research Co.™

Full Circle Research

Founded 2013 | 12 employees
Adam Weinstein and Nathan Lynch, Co-CEOs

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Our industry vets are ready to field your project the right way.
Full Circle Research Co.™
Seriously pure online sample.

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Phone 1-301-762-1972
iLoveFullCircle.com

globalsurvey

Global Survey

Founded 2007 | 25 employees
Mayank Bhanushali, Founder and Managing Director

Global Survey, as our name suggests, is one of the global leaders in using digital data collection to power analytics and insights. We provide data-driven decision-making for clients who listen to and interact with the world's consumers and business professionals through Global Survey online panels, as well as mobile, digital and social media technologies. We apply the breadth of over 88 online consumer panels and communities across 70 countries to your market research studies. And we're dedicated to continually fine-tuning our panel network to ensure quality and growth as your research needs change over time. Global Survey works with many of the world's leading market research agencies, media agencies and corporations.

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

InnovateMR

Founded 2014 | 110 employees
Lisa Wilding-Brown, Chief Research Officer

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www.InnovateMR.com

Ironwood Insights Group LLC

Founded 2017 | 40 employees; 5 call centers
Brad Larson, Founder and CEO

Ironwood Insights Group leads the market research industry for consumer research by offering a seamless integration of all research methodologies into one point of service. We assist corporate researchers, marketers, marketing research firms and consultants with high-quality data collection and analytic services. Our platforms use the latest technology with cloud-based servers and panel integration for increased production, quality and security. We maintain strict security and confidentiality controls. Services include consultation, questionnaire design, sample sourcing, survey fielding, data processing, analytics and reporting. Qualitative methodologies include traditional and online focus groups, bulletin boards and in-depth interviews. Quantitative methodologies include CATI/CAWI, online surveys and face-to-face interviewing, with international reach through vetted partners. We are dedicated to providing our clients with the best research solutions at reasonable rates. Call or e-mail today for "Insights that provide clarity and drive action."

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www.ironwoodinsights.com

Issues & Answers Network Inc.

Founded 1988 | 500+ employees
Carla Lindemann, COO

Issues & Answers Network Inc. is an independent global marketing research firm providing everything from survey and sampling design and data collection (300 CATI stations in four U.S. call centers and 65 CATI stations in Europe) to project management and data analysis. Our international network of reliable alliance partners extends our research capabilities to Africa, Asia, Central America, South America, Western Europe, Eastern Europe, the Pacific Rim and the Middle East. We also conduct online research as well as direct mail studies. We are the only focus group facility in the Virginia Beach area and we have two RIVA-trained on-staff moderators for all your qualitative research needs. A snapshot of industries includes agriculture, alcoholic beverages, consumer durables, consumer packaged goods, financial services, insurance, pharmaceutical and travel/hospitality.

Phone 1-757-456-1100
www.issans.com

Just The Facts Inc.

Founded 1994
Bruce Tincknell, Managing Director

Just The Facts Inc. has 30 years of strategic consumer products qual and quant experience (using extensive online capabilities). JTF Research works closely with clients to develop the optimal methodology to achieve desired client results (e.g., its objectives, what's driving the need to conduct it, outcomes sought, how findings will guide decisions 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 consumer research means having a strategic partner to effectively navigate, guide and manage your important assignments. This means creating an effective plan for researching consumer attitudes, behaviors and usage, as well as concepts, prototypes, new products, brand extensions, packaging, advertising and more. All conducted with in-depth analysis and insightful reporting. Contact JTF for high-quality consumer research. Let's discuss your specific needs and ensure your products and services are ready for market from the consumers' perspective.

Phone 1-847-506-0033
www.justthefacts.com
www.justthefacts.com/testimonials-x-30

Karchner Marketing Research LLC

Founded 2014
Helen Karchner, CEO and Co-Founder

The Karchner Marketing Research consultancy offers artisan research and recruiting across general market and health care industries.
Many companies and organizations engage KMR in their consumer and patient research to satisfy unmet business needs, via qualitative and quantitative PMR. One key attribute of KMR is our flexibility – whether due to an unforeseen pandemic, sudden budgetary constraints or unexpected timing fluctuations, we easily adapt alternative yet contributive methodologies. Respondents enjoy our unique focus group room, think tank and cozy meeting room. Since our respondents are more virgin than career, they're more forthcoming. Respondent-moderator dialogues create articulate insightful discussions about brand equity, integrity, loyalty, new/alternative product profile evaluations, employee and customer satisfaction, messaging and advertising impact and deep-dive discernments. We've identified the overarching quintessential focus as inter-communication with respondents. Value establishes prominence!

Phone 1-610-564-9624
www.KMRResearchStudio.com

Krämer Marktforschung GmbH

Founded 1986 | 53 employees
Markus Albrecht, CEO

Krämer Marktforschung GmbH is one of the leading European field service institutes in qualitative and quantitative market research since 1986. We implement all relevant survey methods for your consumer surveys with our own interviewer field and recruiting staff and our own studio facilities in Frankfurt, Munich, Hamburg, Berlin and Muenster (i.e., CAPI in home, mall intercepts, PoS, focus groups, product tests) to meet your customer´s requirements. Thanks to our international Cido Research facilities in Europe, Asia and Canada, we cover large CATI surveys with more than 600 stations in nearly all countries throughout the world. Krämer – the most trusted partner in MR data collection. Please contact us at m.albrecht@kraemer-germany.com to learn more!

Phone +49-2501-802-118
www.kraemer-germany.com

The MSR Group

Founded 1994 | 165 employees
Don Beck, Ph.D., CEO

The MSR Group is a full-service research firm offering complete consumer and business-to-business research services. The MSR Group specializes in customer experience management, focus groups, brand awareness, advertising and creative testing and mock juries, along with a wide array of custom quantitative and qualitative project offerings. In addition, we can provide you with groundbreaking verbal and facial recognition AI technology to provide real-time CX feedback to managers on customer and employee sentiment – a powerful new tool to improve coaching, training and ensuring business compliance. Specifications: 150-station TCPA-compliant CATI call center, web and IVR surveys, executive interviews and focus groups.

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www.theMSRgroup.com

Murray Hill National

Founded 2013 | 22 employees
Susan Owens, COO

Clients trust Murray Hill National with thousands of studies per year as their research partner. In return, we deliver valuable solutions and high-quality recruitment for their consumer, health care, business-to-business and technology projects. For the last seven years Murray Hill National LLP, rebranded under new ownership, has advanced to one of the leading data collection and recruitment companies in the U.S. Our teams are committed to tracking down your target audience. We provide high-quality recruitment for a multitude of industries, such as business-to-business, technology, health care and consumer projects. Our qualitative services extend far beyond the traditional focus group as indicated above. Our call center has 45 CATI stations where we conduct all of our telephone interviewing including qualitative, quantitative, phone-to-web or old-fashioned CATI. Call us today for your next project!

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www.murrayhillnational.com

Precision Opinion Inc.

Founded 1996
Michael LaMastra, Business Development Executive

Precision Opinion Inc. is the firm that has been uncovering the insights that drive success for Fortune 500 companies, politicians and social science organizations since 1996. With their 700-seat domestic CATI station call center and PrecisionSMS, the leading innovative technology for the next evolution in market research, they are able to offer unmatched quality insights from anywhere in the United States. While one of the largest privately held market research firms, they still pride themselves on maintaining a bespoke mentality. One that creates done-for-you services and customized reporting capabilities to maximize your results. To discover more about Precision Opinion, contact them today at sales@PrecisionOpinion.com or 1-702-727-3773.

Phone 1-702-727-3773
PrecisionOpinion.com

Sibyl Surveys by Signet Research

Founded 1968 (Signet Research); 2018 (Sibyl Surveys) | 24 employees
Byron Zanopoulo, Managing Director and Omer Tumkor, CTO

Sibyl Surveys is a customer experience and survey software solution designed by Signet Research, a full-service market research company conducting consumer research for over 50 years. It features an intuitive UX with the advanced survey logic and reporting functionality needed to serve a full-service professional CX research operation. When you license Sibyl, you're not just getting access to a CX and survey platform. You're licensing an extension to your internal CX/research department. The Signet staff is available for everything from best practice advice to full survey design, integrations and more. We can help you set up your ongoing CX tracking campaigns, program complex surveys and even take projects off your hands completely. The result is an affordable, easy-to-use, full survey logic platform serviced by research professionals.

Phone 1-201-945-6903 x23
sibylsurveys.com

SurveyMonkey

Founded in 1999 | 1,300+ employees
Zander Lurie, CEO

SurveyMonkey Market Research Solutions make it easy for anyone to collect quality data from consumers, fast. Our global online panel, SurveyMonkey Audience, offers instant access to 80 million consumers in over 100 countries. 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 project feasibility, get a cost estimate and launch your research study with one click. SurveyMonkey Audience is integrated into our flexible surveys and new Expert Solutions for concept and creative testing that generate AI-powered insights and presentation-ready reports for you. We also offer light research services to help you scale your research program. Contact us to learn more or to get a demo of our solutions.

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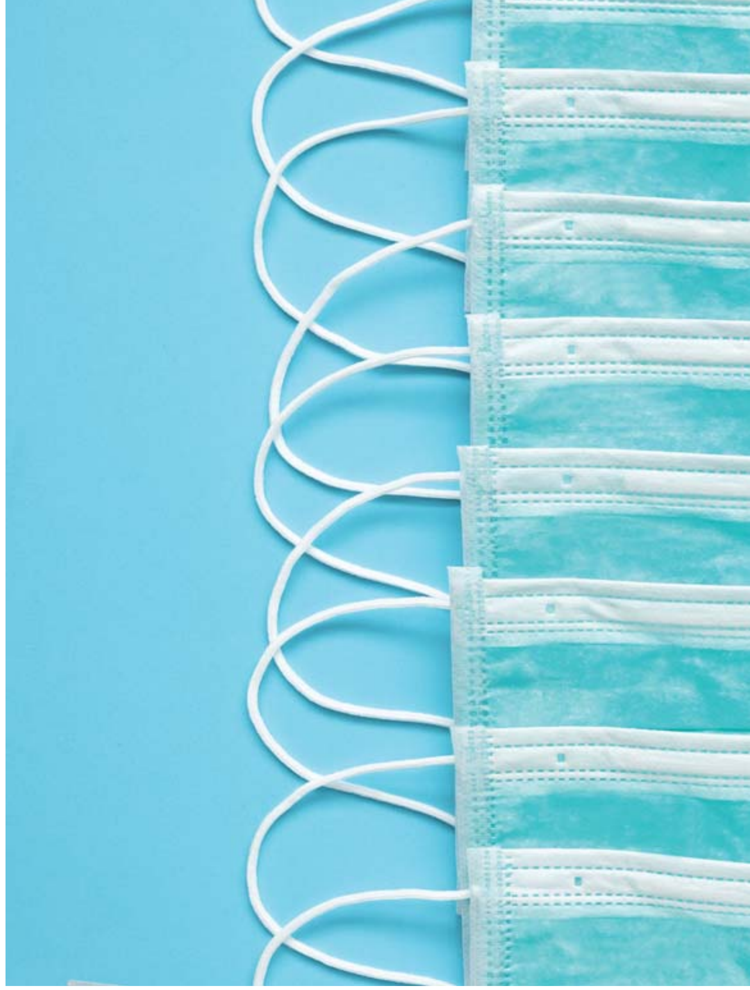
Symmetric, a Decision Analyst Company

Founded 2016 | 150+ employees
Jason Thomas, President

Symmetric provides sampling services to companies that place a very high value on representative samples, scientific sampling methods and advanced fraud detection systems. Our online panels are carefully balanced, continually refreshed and systematically cleaned via high-tech and low-tech methods. Non-responders, speedsters and cheaters are continually purged. Symmetric provides sample for both qualitative (focus groups, depth interviews and ethnographies) and quantitative projects. Our American Consumer Opinion® worldwide panel consists of over 7 million consumers. Symmetric also operates five B2B worldwide online panels for physicians, contractors, medical professionals and executives. Additional services include programming, hosting, online communities, tabulation, coding and IHUT mailing.

Phone 1-817-649-5243
www.symmetricsampling.com



One size doesn't fit all

COVID-19's impact on African American, Asian and Hispanic consumers

| By Roben Allong, Patricia Lopez and Iris Yim

snapshot

The authors examine the contextual and cultural factors behind the pandemic's effects on three consumer groups to help develop more successful research and marketing in the virus's aftermath.

www.quirks.com/articles/2020/20200706.aspx

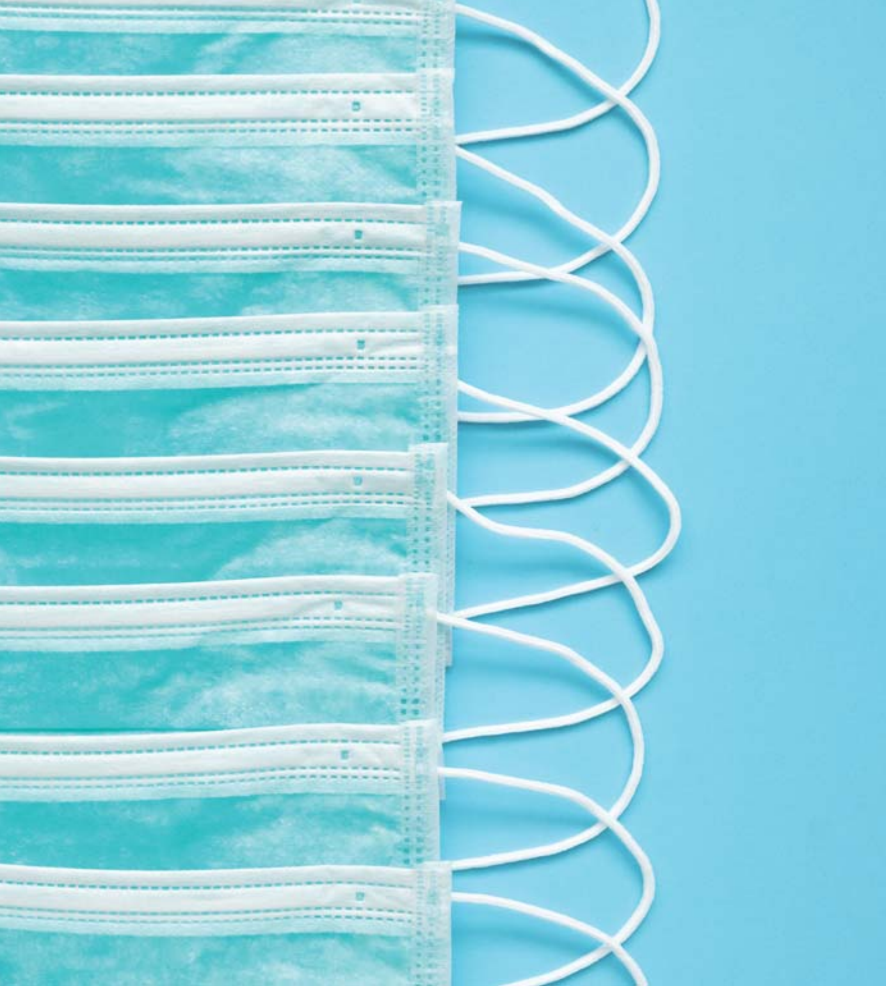
COVID-19 has been a jarring wake-up call. While the idea of traditional research on ethnic consumers and their disparate COVID-19 experiences is certainly not a groundbreaking proposition, what clearly will be evident post-COVID-19 is that one size does not fit all. As infection numbers and death tolls from the COVID-19 pandemic in the U.S. are tallied, racial breakdowns show that the pandemic has had different impacts on communities of color.

Regardless of whether you do multicultural research, the advent of COVID-19 will have a tremendous impact on consumers across all ethnicities and their engagement with brands going forward. According to The Age of Dissonance, a recent Nielsen annual marketing report, the No. 1 goal of 41% of marketers surveyed was to reach new customers. In the quest for new customers, striking the right tone with brand messaging and communications to broaden your audience and reach consumers across all ethnic groups will become increasingly important. Companies that invest now in research to better understand the cultural and social dynamics of people of color will come out ahead because of the extensive influence they wield.

This article explores possible contextual and cultural factors behind the pandemic's impacts specifically on the African American, Asian and Hispanic communities to provide a better understanding and foundation, post-COVID-19, for more successful research studies and brand interactions with these audiences.

African Americans: distrustful of government and fearful of being left further disadvantaged

According to recent Associated Press reports, African Americans account for more than one-third of the COVID-19 deaths even though they make up only 14% of the general population. And while medical and health care professionals point to income inequality, health care and



access disparities that lead to disease susceptibility, one cannot help but wonder if there are other factors, other parts of the African American story that haven't been told.

Culturally, most African Americans have been and continue to be mistrustful of messengers that wield large amounts of authority and power over them such as the government, law enforcement and big business. Compliance with messages about COVID-19 were not a top priority at the start of the crisis. In an Axios poll less than 60% reported that they trusted the local state health department, the National Institutes of Health and the World Health Organization, underindexing compared to other ethnic groups.

In the United States, wearing face coverings is neither traditional nor socially accepted. To be frank, they are stereotypically associated with criminality and attempting to hide one's identity. African Americans and others know all too well how quickly they, in particular, are associated with negative stereotypes. They avoid any actions like wearing a face mask that would expose them to further harassment from law enforcement or anybody else.

Contextually, and more importantly, because of urban housing conditions and a preponderance of employment in essential frontline, low-paying jobs – from grocery clerks to delivery people to public transportation and safety workers often in close quarters with others – African Americans don't have the luxury of working from their homes and are forced to interact with infected and asymptomatic members of the public. That inability to practice social distancing because of their livelihood leaves them more open and susceptible to becoming infected with the virus.

Lower penetration of laptops and Wi-Fi to continue work or schooling remotely places African Americans and their children at a unique disadvantage. The lack of access to earn income from non-frontline jobs and, especially when school does resume, time and learning lost, are setbacks that may not be overcome for some time. The COVID-19 experiences of African Americans are, without a question, quite different from other groups.

Implications

Interestingly, according to 2019 Pew Research, there were more 27-year-olds in America in 2018 than any other age. But the most common age among whites was 58, more than double that of minorities! It was 27 for African Americans, the most targeted age group of most marketers. Going forward, post-COVID-19, greater representation in research studies that reflects this and other demographic evolutions will be vitally important to get a better understanding of this community. The crisis also presents a new opportunity to continue building, albeit remotely, a more empathetic rapport with segments that were not as willing to connect in the past but because of social distancing want to connect more.

The lack of trust, common across all generations of African Americans, also extends to big business and brands that have not been/are not authentically engaged with them during this trying time. Researchers should not expect that this population will automatically go back to business as usual. In fact, researchers must become much more culturally aware and empathetic to solicit authentic stories and not meaningless platitudes when conducting studies. With overindexing mobile phone usage as well as outsized access of and influence on social media, African Americans are no longer just a minority population, they are influence dominators. They can digitally kill a brand's credibility on megaphones like Twitter, Instagram or Facebook if they feel it is not relatable and the message is tone-deaf. And they will do it quickly and indiscriminately. No brand is safe. Just ask Gucci, Prada, Dove and Papa John's.

African Americans are no longer the monolith they were once perceived to be. Instead they are a very diverse group with Caribbean, European, African, Latin and South American, Middle Eastern, Asian and many other heritages from around the globe. Collecting and understanding their diverse stories using today's online methodologies with mobile applications is pivotal to generating insights that could grow audiences and prevent costly communications disasters. Marketers looking to enhance outcomes that do not acknowledge this audience's COVID experiences will decrease brand engagement and motivation and, ultimately, erode brand currency, not only among them but the millions of consumers influenced by the culture.

Asian Americans: concerned about discrimination and safety on top of health and finances

Depending on data available and the region where the data is pulled, the infection and death rates among Asian Americans are on par with or slightly lower than the general population.

The majority of Asian Americans are foreign-born and have close ties to home countries in Asia. Since the pandemic first broke out in Asia at the end of January, they have closely watched what was happening. They were better informed of the danger and of effective measures for self-protection and preventing the virus spread. When the outbreak first happened in Asia, Asian governments encouraged wearing face masks early on, whereas Western countries were late in encouraging citizens to do so. While wearing a mask is perceived to be associated with criminality in the West, it's common in East Asia. People who live in metropolitan areas with air pollution frequently wear face masks to keep their faces clean and also filter the air they breathe. Wearing face masks became an essential component in virus containment during the SARS outbreak in the region in 2002-2003 and has been further integrated into daily life afterwards. For example, since the outbreak, the Taiwanese government has made sure that face masks are available to all residents.

Culturally, Asian Americans tend to be group-oriented and more willing to sacrifice individual rights for the greater good of the community. Conversely, non-compliance to virus containment measures is seen as a threat to public health. According to Judy Yuen-man Siu, a medical anthropologist at Hong Kong Polytechnic University, wearing a mask in Hong Kong during an epidemic is considered a civil responsibility and people not wearing a mask will be stigmatized and discriminated against. In China, a Chinese Australian female who went out jogging without wearing a mask in Beijing was reported by Netizen and the incident report quickly went viral on social media in China, drawing ire of the entire country. She was fired from her job. Group orientation, by and large, has tended to increase compliance and influence the pandemic's impact on Asian Americans.

COVID-19 has also inflicted a psychological and emotional toll on Asian Americans. Since the pandemic first broke out in central China, overseas Chinese and East Asians in general (mistaken to be Chinese) have experienced a huge rise in xenophobia and discrimination. While cultural traditions and experiences played a tremendous role in influencing the level of compliance, they did not prepare this segment for the sudden onset of discrimination. There were spikes in mentions of "discrimination against Chinese" on WeChat, the most popular social media app in China, and among Chinese overseas. Within the first week since Stop AAPI Hate's launch on March 19, 2020, the reporting platform received over 650 reports of discrimination incidence related to COVID-19.

Implications

With shrinking market research budgets and the need to quickly pivot and adapt to a new normal, the need for agile and cost-effective market research is greater than ever. Higher internet penetration and adoption of technology among Asian Americans means that it will be easier for researchers to engage with them and capture their experiences via online research methodologies such as online bulletin boards, video chats, video diaries and live online text discussions. In-language research among Asian Americans is key to increasing participation and platforms such as 20|20 and HatchTank that also offer machine translation with higher accuracy rates make in-language online qualitative research more user-friendly than it used to be. For marketers who are considering doing research among Asian Americans, it's highly advisable to adopt online methodologies to ensure more robust engagement.

Asian Americans traditionally have been both underrepresented and misrepresented in mainstream media, especially during this pandemic. Researchers increasing their awareness of the issue of discrimination and showing support for Asian Americans help build a more meaningful connection for better insights. Deeper cultural awareness translates beyond building a connection with them in the U.S. It can also help brands build rapport with a much broader consumer base in Asia, given the reach of social media and the internet. Messaging that conveys a united stand on important issues, such as fighting the rising discrimination during times of crisis or highlighting Asian American health care workers on the frontlines, as well as adhering to accepted cultural traditions is more apt to be looked on favorably and get traction in the community.

Hispanics: dealing with more than just the fear of the virus itself

Similar to many African American consumers, Hispanics tend to be hourly employees who do not reap the same benefits and extended pay of salaried workers and for many, their employment came to a halt after shelter-in-place orders took effect. According to a recent Pew Research poll, more Hispanics than the general population reported someone in their household had lost a job or had to take a pay cut due to COVID-19.

For those who are still working, the coronavirus outbreak has made their situation even more precarious, forcing them to risk their lives to save their livelihood. While many employers have stepped up and provided safety gear such as masks and gloves, those who work in construction or as gardeners/landscapers, for example, are relying on their own means to stay safe.

As part of their story, one of the greatest challenges Hispanics face is adapting their behavior to comply with social distancing guidelines. Culturally, family and social gatherings are vital to this community. How is it, they wonder, that adult children can't visit their parents, grandparents can't celebrate a grandchild's birthday and all planned festivities and celebrations now have to be cancelled or postponed? Their biggest challenge is understanding that even immediate family is a risk to health and welfare.

Furthermore, Hispanics are culturally programmed to shop for groceries on a daily basis in their countries of origin. In the United States, it has become a weekly or biweekly activity that tends to coincide with payday and usually makes for a family experience. Shopping to cover large periods of time, i.e., shelter in place, is not possible because their budgets are still designed to cover shorter periods of time. Therefore, it's business as usual even with warnings/restrictions of going into grocery stores.

Supermarkets that cater to this segment have done a great job of adjusting to the new regulations in order to keep their stores open and stocked for these consumers. For example, Northgate, a Mexican-owned, California-based chain of supermarkets, was the first to implement plexiglass barriers for its cashiers and first to designate special shopping hours for seniors. It is doing everything it can to keep its customers safe, given that not all are complying with new regulations. Nonetheless, there are still entire families shopping at the store, not everyone wears masks and some still struggle with the six-foot social distancing guidelines, even with markers on the floor.

Change is difficult for everyone but especially for a segment like this one that thrives on family time and family interaction. Perhaps it's part of the fatalistic mentality that Hispanics are known for and is an important part of the overall culture – "It's all in God's hands/God will protect us from evil." Or simply the fact that they must continue to risk what needs to be risked in order to provide for their families and for their mental/social well-being.

Implications

While government directives around COVID-19 are still evolving at the time of this writing, one key element that will help address stay-at-home ordinances is to continue providing the Hispanic community with factual information in terms and situations they can understand and relate to. This is critical to overcoming both cultural and language barriers and ensuring greater compliance. Univision and Telemundo have done a great job of having their talent featured on PSAs and local news personalities provide PSA segments throughout their daily programing – stay home; don't visit family and friends; wash your hands; wear a mask; beware of cross-contamination when wearing gloves, etc. – to connect with and motivate the community. For most Hispanics, like other ethnicities, their lingering concern is being left in an even more tenuous situation after COVID-19, thanks to unpredictable and uncertain economic effects.

Not business as usual

Because of their diverse experiences, it will not be business as usual across the ethnic groups presented here after the virus is under control. While no one has the answers today, marketers and researchers now have a unique opportunity to rethink the rules of engagement for conducting both quantitative and qualitative research. Along with redefining engagement, to get a more accurate post-COVID-19 consumer picture, consider recruiting for a better representation of culture and ethnicities. Employing remote qualitative research methodologies to express interest in and connect with these consumers while they are in need will not only be enlightening but also potentially rewarding thanks to revenue-driving insights.

Consider this crisis an opportunity to also course-correct the way we interact with study participants. Savvy researchers who understand that one size really does not fit all will ask participants the right questions in the right context and in culturally appropriate ways to uncover more of their inner motivations and yield fresher, more nuanced answers. Finally, companies that are focused on acuity and agility, in spite of budget restraints, understand that increasing cultural research right now will drive more engagement and help them win with these valuable consumers in the months and years ahead.

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••• shopper insights

Habits old and new

Unpacking consumer elasticity in a COVID-19 world

| By Lincoln Merrihew

snapshot

Lincoln Merrihew looks at the components of consumer elasticity and how they may interact to impact purchasing habits moving forward.

www.quirks.com/articles/2020/20200708.aspx

There's good news and bad news. The good news is that we get to dive deeper into consumer elasticity (a concept I first floated over a decade ago). The bad news is that it's relevant again because of the current economic turmoil brought on by COVID-19.

Let's start with defining what the terms mean. "Consumer" refers to people buying goods and services. Keep in mind that consumers purchase for many different reasons, not all of them logical. "Elasticity" refers to the ability of something to resume its normal shape after being stretched or compressed.

Certainly in the current climate, consumers – and businesses – are feeling both stretched and compressed. Consumer elasticity as a concept, therefore, refers to the extent to which consumers will return to normal behaviors as the economy recovers. It is more complex than the traditional price elasticity, which is rather sterile.

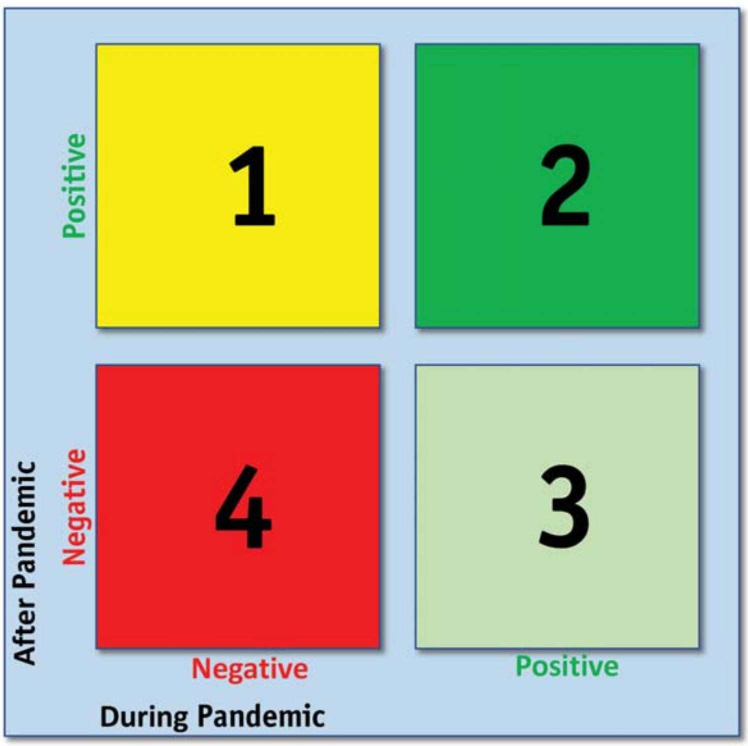
Consumer elasticity impacts all businesses. Those that have been hit adversely want their old shoppers back, while those that have benefited (e.g., sellers of toilet paper and disinfectants) want to keep their new customers and new sales levels.

To frame the discussion, it's useful to think of businesses in two ways: those that have benefited from the current crisis – whether by design or happenstance – and those that have not. That's shown in Figure 1 using the X-axis. The Y-axis represents how those two categories will fare in the post-COVID-19 era. Box 2 represents the ideal: a brand or product that experiences a positive impact during the crisis and maintains it afterwards. They want very low consumer elasticity because they don't want a return to the old normal.

An example of a Box 2 company could be a maker of hand sanitizer. People bought more as the pandemic unfolded and, as a preventative measure, may continue to buy it afterwards to feel safe and prepared.

And they may have it everywhere: many rooms in the house, their cars, their offices, etc. So, a maker of hand sanitizer could experience a boost during the crisis and maintain boost levels afterwards.

Figure 1



An example of Box 1 would be your favorite restaurant. It may have suffered during the pandemic, getting by on to-go orders, but as we come out the other side its customers return (i.e., they see complete consumer elasticity as customers return to pre-crisis behaviors).

Box 3 represents an unsustainable short-term gain. Some food-delivery services may fall into this category, with more people returning to dining out more often instead of having food delivered.

Components of consumer elasticity

Let's think about what would make a consumer resume normal patterns vs. prevent them from doing so. Some of the components of consumer elasticity are explored below. While each element has its own elasticity, to help create a unifying equation around that, Table 1 groups them into positives and negatives. (In the table, brand presence in terms of negatives and positives refers to the pre-pandemic brand.)

Financial. This is the simplest one and one most people may focus on because it's well-understood and relatively easy to measure. It refers to people's ability to buy goods and services because they have the money to do so or can get credit at reasonable rates. The elasticity of this measure refers to how quickly financial wherewithal returns to pre-crisis levels, such as when furloughed consumers go back to work.

Confidence. Rather than consumer confidence in aggregate, this refers to how confident a given consumer is that the economy and their slice of it has recovered and – as importantly – will stay recovered. The elasticity of confidence refers to the extent to which consumers have been shell-shocked and the time it takes to recover.

Actual and perceived need. In some cases, consumers can postpone purchases and in some cases they cannot. You may be able to get by with a slow cellphone for another month but if it's been damaged beyond use you'll need to replace it now. Likewise, you can patch your

Table 1

Positive (more of this aids elasticity)	Negative (more of this hinders elasticity)
• Financial • Confidence • Actual Need • Perceived Need • Emotional Self-Reward • Brand Presence (consumers return to old brands) • Brand Trust • Product Availability	• Power of Frugality • Stockpile Fallout • Brand Presence (new brand has a negative impact on old brand) • Brand Distrust

jeans but you probably can't patch your leaky car tire. Perceived need also has to do with what consumers feel is necessary. Some people may never return to dining out as much if they've become new fans of home cooking. Elasticity here refers to the extent to which consumers feel the need is now to replace or restart postponed purchases.

Stockpile fallout. This refers to the backlash of hoarding goods. If you have a garage full of toilet paper because you stockpiled, you'll likely decide that you don't need to buy more for several months once you feel things are somewhat back to normal. For these goods, the elasticity will be bumpy: extra purchases during the crisis followed by a pause, potentially followed by a return to normal. Of course, "normal" may have changed as consumers may feel that an extra-large supply of something all the time is prudent.

Emotional self-reward. This refers to the degree to which consumers treat themselves to a reward for a hard day's work or simply for making it through the pandemic emotionally, physically and financially. The parallel is the classic Friday night beer after a hard work week or something akin to the L'Oreal hair color slogan "Because you're worth it." Elasticity here will be a function of when consumers feel that they have permission to celebrate. What constitutes a celebration is unknown. At this point, even eating out a restaurant could make some people giddy.

Power of frugality. In some past recessions, it became trendy to be frugal (almost the antithesis of the permission to celebrate). Meaning, not only was there a need to be frugal for financial reasons but it also became something akin to shabby chic. One example cited is the emergence of the tiny-house movement after the last recession, which was a pendulum swing away from the mega-mansions that seemed to be popping up everywhere. Elasticity here refers to the extent to which being minimalist becomes trendy and remains so.

Brand presence. Brand presence is one of the more complex components of consumer elasticity. ("Presence" is different from "familiarity." Familiarity refers to the extent to which a consumer has heard of a brand. Presence refers to the biases created from having a brand visible and in your day-to-day life.) Complex because it addresses former brands and newly found brands and, in particular instances, when one brand has replaced another. In terms of former brands, elasticity pertains to consumers returning to old habits and brands. Some of those brands may have been abandoned after their products were simply not available and a consumer determined that the brand is no longer needed or desired. Elasticity here is also impacted by the extent to which a consumer has adopted a replacement brand and decides to stick with it even after the economy recovers. That could be because the new brand performs better or simply because the new brand is now the "habit" brand (i.e., the one the consumer has become accustomed to and is present in the household).

Brand trust. This is another complex brand-related component of consumer elasticity. It is less about availability and more about brand perceptions. For example, if the price of a product suddenly increased during the COVID-19 era, consumers may feel angry toward that brand – whether or not the price-gouging was the brand's fault – which of course creates distrust. Likewise, availability: If the consumer feels a brand deliberately held back production to drive up prices, that negative connotation could contaminate consumers' perceptions. In contrast, a brand that appears to have gone above and beyond during the crisis may earn a newfound trust. For example, automakers switching to production of ventilators and masks or companies buying up food that might otherwise be thrown away to give to people in need. We have already seen brands becoming more empathetic in messaging to create trust, along the lines of "we'll get through this together." The elasticity component refers to how long the impact of empathy is relevant and whether it returns to pre-pandemic levels.

Product availability and alternatives. Early in the COVID-19 era, some categories of items were simply not available. Consumers either went without or changed to products in different categories. For example, with salons and barbershops largely closed, some people cut and colored their own hair (or had friends do it). And with many restaurants closed, some consumers may have realized a newfound joy in cooking. Elasticity here refers to the extent to which consumers return to categories of products and services they used to buy vs. deciding they no longer need them or sticking with the new alternatives they discovered.

No easy feat

Measuring consumer elasticity is no easy feat. Each of the elements noted above has its own elasticity and the speed of the rebound will vary for each one. And with no recent pandemics of COVID-19 magnitude to use as a baseline, there will be a lot of uncharted water.

The simplest measure will be purchase behavior: what do people buy, how often and at what price (such as at a premium or a discount). Unfortunately, that's at the end of the consumers' journeys and after the window to influence them has largely passed. And what consumers buy may not always reflect what they really wanted to buy.

The art will be in tracking the elasticities in tandem as they change and understanding which are the leading indicators and which are the dependent vs independent variables. For example, understanding when or if "emotional self-reward" outweighs the "power of frugality" or whether they can coexist.

Exciting and frightening

So, what happens next? Well, actually, we don't yet know! That's exciting from a purely research perspective and frightening from just about every other perspective. It will certainly be dynamic. The rules may have changed, some metrics will be outdated or misleading and consumers may bounce in many directions – not just bounce back.

It will come down to which companies and brands see the writing on the wall before the others. Some kept conducting research through the pandemic. As long as their analytics people are savvy enough to distill and frame the new data in a business context, those companies and brands will have an edge.

Unfortunately, many companies turned off research during the pandemic, which not only created a break in their trending data but also a lack of insights on how things have changed. It's like trying to guess the ending to a 10-part Netflix series when you stopped watching after the third episode. For these companies, the art will be getting research started again quickly and efficiently and getting at least a pulse on their markets as soon as possible.

Turn research back on

The best advice is to turn research back on, monitor the data and trends, fill your data gaps quickly and be ready to adjust strategies including agility in branding, production, pricing, etc. And be bold: question everything. Question the trends, question the nuances and even question the metrics themselves. In that regard, be prepared to have to create new metrics. The goal is to develop a consumer elasticity equation per the above, with inputs, weights and interrelationships quantified. It won't be perfect but as a new science, it will be best-in-class right out of the gate. And having it will lead to a competitive and business advantage.

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••• shopper insights

The more things change…

Five shopper insights fundamentals that still apply

| By Bill Bean

snapshot

A constantly changing retail environment doesn't negate the value of established ways of thinking about retail and shoppers.

www.quirks.com/articles/2020/20200709.aspx

Shopper insights as a discipline has gone through a few definitions and practices in the 20 or so years since it was recognized. Much has changed in retail and marketing. New retail technologies and ways of selling crop up at every industry meeting and capture our attention every day.

The challenges presented by new channels and technology demand knowledge to manage success and many people have argued that they dictate completely new approaches to research. In the rush for the new, there are concerns that proven fundamentals may fall by the wayside. Even in complex and innovative times, we should not be so quick to reject them. They are still productive.

Fundamental #1: It's not just about stores

A shopper insight is learning at the point of purchase that can shape, influence and refine marketing and sales strategies. Shopper research produces those insights. There are plenty of other definitions and while it's probably not worth spending much time dissecting or specifying your definition to perfection, having one does help an organization know what it is talking about and why it requires focus.

The point of purchase itself refers to any area where a transaction happens. Note that the definition is not specifically about a "store." It refers to any place that is designed to capture the attention of potential buyers and convert that attention to a sale. That place should manifest the marketing and sales strategies of sellers and "store" owners. It may be a store, an e-commerce site, a community market exchange, a restaurant, a bank or even a doctor's office. The principles of shopper insights apply to any area where a transaction takes place. I'll refer to them all as stores for ease.

Fundamental #2: Shopper vs. consumer is an important distinction

This definition also implies a clear delineation between shoppers and consumers and between shopping and consumption. Although obviously related, the targets and their psychology are different. The focus of shopper insights on purchasing

per se dictates different questions, business challenges and, sometimes, different focus. Needing a common language with retailers focuses shopper insights on categories. At the most fundamental distinction, shoppers and consumers can be entirely different people and not just have different mind-sets and goals. Pets and infants, for example, never shop for their own food and toys. Shopping and consumption are different behaviors and require different approaches.

There are two common questions about this distinction: Do I need separate people to manage shopper insights versus consumer? If I do need separate people, where should they report in the organization?

The answer to the first question is: not necessarily. There are some variations in skillset but generally insights skills travel well between the two disciplines. So the answer really depends on the needs and culture of the organization.

The answer to the second is: it depends. Research shows that reporting structure is not related to shopper marketing productivity. The Conference Board and several of the large management consulting firms have indicated that while lots of organization structures exist, none has an effect on productivity. Results show that any successful insights discipline must focus its priorities and, above all, be curious. With few exceptions, if the organization or individuals are curious enough, any reporting structure can be productive.

Fundamental #3: Questions are really important

The questions generated by that curiosity are the key drivers of valuable insight. These are my big strategic shopper insights questions:

- What drives category growth?
- What is the size of the prize?
- Who are the key category targets?
- What are those targets' wants and needs?
- What is the sequence of shopper experiences that lead to purchase?
- How and where can we influence that path to purchase?
- How do we optimize the reach and content of shopper communication to be more influential?
- How does the purchase environment affect expectations and outcomes?
- How do we ensure the maximum impact of point-of-sale programs on key indicators?
- How can retail and brand equity interaction be leveraged to mutual benefit?

These are enduring strategic questions, as relevant today as 20 years ago, and as relevant to new channels as old and it's obvious that as a discipline we have not finished answering them.

These questions cascade into everything on the shopper insight agenda and dictate the methods used to find answers. They bring life and order to curiosity and refine the ability to understand and overcome the business challenge. Any methodologies should be chosen after comparing their ability to meet the goals with the resources available.

Getting the question right leads to deeper insights and more innovative solutions. I designed and co-teach a course on how marketing and salespeople can become more insightful. We do not teach research techniques but instead focus on asking the right kinds of questions to inspire; find potential root causes; stimulate and provoke. If you want to improve or start a shopper insights group, start with the quality of your questions, not with techniques.

Here is an inspiring list of shopper questions from Kate Newlin's book, Shopportunity!: How to Be a Retail Revolutionary: "I want to understand why we're willing to spend $3.50 for a latte at Starbucks but bristle at a 10-cent increase in the price of toothpaste. I want to learn why we'll drive miles out of our way to buy a bag of 100 razor blades for 50 cents less than at our local store and then spend $3.99 on a tub of pretzels we didn't know we needed and that we'll resent having eaten once it's gone."

I'd like to know those answers too. They are inspiring shopper insights questions. They are precise, researchable, energizing and generalizable to other situations.

Fundamental #4: Existing tools for knowing shoppers are good if you know how to use them

Shopper insight tools are similar to those of other disciplines but often applied in a different way and with a different emphasis. The shopping environment plays an important role in usage and results.

I prefer this higher-level grouping of shopper insights tools: observation; conversation; measurement; experimentation; modeling.

All are important and all have demonstrably led to increases in our understanding of shopper motivations and behavior. Not every problem requires every tool but the use of every tool adds to the general knowledge of shopping.

Observation. This is the fundamental technique of shopper research, relied on more often than in any other insights discipline. Despite the oceans of scanner data or click patterns, there is no substitute for observing your shoppers. Sometimes observing is enough by itself.

The medium is irrelevant (live or filmed). Seeing the action is essential. In our course on becoming more insightful, we show videos and simply ask, "What did you see?" Invariably, a video of a child and his father shopping for breakfast cereal will quickly bring forth product placement or POS material critiques versus a description of the activities seen. Only after multiple "tell me what you see" requests does the class realize their error. Only then do they note who the real shopper is (the child) and the limitations posed by the child's height (can't see top shelves). Quieting the inner expert and ego is key to really seeing and then discovering profound shopper insight.

Conversation. There are many ways of talking to shoppers (one-on-one IDIs, focus groups, projective techniques, surveys, shop-alongs). All have limitations but all are also valuable for certain shopper insight problems.

In Shopportunity, we see the author's search for deeper truths about shopping behavior. She conducted shopper interviews to ask hypnotized respondents to describe in detail their most "memorable and powerful shopping experience." The majority of women recounted the purchase of their wedding dress. Most men shared the purchase of their first car.

Newlin found the ideal, super-powered shopping experiences against which all other shopping is compared. These experiences share psychological components: anticipation, pursuit, prominence and appreciation. With high levels of anticipation having built for years, the perfect item is hunted and located with some difficulty. Once attained, the purchase gains status, is treasured and gives back in memories for years. It is a powerful story whose significance is buried in the subconscious but revealed through conversation with the shopper.

The availability of massive amounts of data leads some researchers and marketers to deride these data, calling the stories lies, exaggerations or the result of faulty memories. "Shoppers don't know or remember why they choose, so the data are unreliable at best and mendacious at worst." They advocate passionately for the abandonment of these tools in favor of "more objective" methods.

Tools are valuable if you know how to use them properly. A well-designed survey, with appropriate benchmarks and analytics, is still a source of insight. Used properly it will reward; otherwise, it is like using a screwdriver to drive a nail. Failure isn't the screwdriver's fault.

Measurement. There is no shortage of shopper-related things to measure, from stores, sales material and respondents. As usual, deciding which measures to use depends on the question as well as who is asking (buyers or sellers, retailers or vendors, creators or users). And how you will be collecting the data, whether it's direct behavior measurements or the result of shopping. It is hard to see the value in "why" questions if the "what" and "how" are not adequately and accurately measured.

Some measures prove to be extremely useful. However, the current state of measurement in shopper marketing gives truth to the Albert Einstein quote, "Not everything that counts can be counted and not everything that can be counted counts."

Evolving technology offers opportunities to measure in new ways. E-commerce practically defined the term "big data" and sheds light on the digital path to purchase. Similarly, the physical path to purchase can be defined with precision (previously impossible). Tracking sensors and videos measure shoppers' interaction with products and aisles so the physical path to purchase can be defined with precision (previously impossible).

Nielsen or IRI data will show a product selling in 80% of the stores in the country, for example, while direct measurement in the stores shows only 20% of shoppers actually see the item. Thus the effective national distribution is ~16%.

It's been proven that understanding and measuring behavior leads to improvements that help generate increased sales. For example, designing stores for excellent shopping experiences with accurate knowledge of behavior improves annual revenue by as much as 12%. Using your questions and decisions to guide measurement is a good way to sort the measurement potential. Is the measure valid? Is it accurate? Does it help to understand your questions?

Experimentation. There are lots of ways of knowing the marketing world but it is hard to beat a good experiment with a great control group. The above assertion about the potential of physical store redesign based on actual shopper behavior is taken from real data from an experiment. A large-format retailer in the northeastern U.S. rearranged an entire store based on measures and analysis of shopper preference and traffic. The principled redesign immediately resulted in a 17% increase in sales versus a nearby control store and a sustained 12% increase over the entire year. There was no other remodeling.

Large e-commerce businesses conduct thousands of experiments every day, making design decisions driven by data and confirmed by trial and error. In the digital world, almost everything we experience has been chosen by experiment; by myriad shoppers choosing one option (A) over another (B). Results and adjustments are realized almost in real-time.

That approach is more expensive and tedious in the physical world but it is still important. Evolving virtual reality technology is allowing testing of almost any physical option in a virtual setting where we can represent any store environment in a virtual manifestation of the shopping experience. In the words of Stephen Needel, a pioneer in this technology, "We can conduct package tests without a package, price tests without paying and store tests without the store."

Experimentation should be a vital component of any shopper insight practice and virtual testing is an essential shopper insight tool. For example, there is a longstanding theory in CPG space management that the shelf arrangement should reflect how shoppers make decisions. For our category the metric for the hierarchy of shopper decisions clearly indicated that shoppers were more loyal to a key product attribute than to brand. The theory would then dictate that the shelf should be arranged almost exactly the opposite of the current state, which assumes the brand is the most important. Rearranging those shelves even in a limited test would be both logistically and financially very expensive so we tested the idea in a virtual environment. The results of all of the virtual testing showed no difference between the two conditions. The virtual experiment both cast doubt on the practice based on the theory and prevented us from any expensive upheaval at the shelves.

One defends virtual shopping by using the same argument for surveys. Yes, VR is not real. Yes, respondents don't spend real money. But despite those seeming limitations, shopping decisions in a virtual store mostly correlate with shopping in a real environment. Item shares match. Trial and repeat patterns validate. Even purchase dynamics largely agree. These validations are regularly published.

Properly trained and prepared, virtual store shoppers provide us with valuable and valid data to guide decisions. What limitations we know are pretty easily avoided or managed. Purchase decisions involving heavy items and shopping where any sensory experience besides visual is important can be a limitation. But for the most part virtual reality shopping is a valid tool for experimentation.

Modeling. At their best, models are ways of thinking as much as they are an approximation of reality. Whether physical or mathematical, models are a way to make sense of a complex world and shopping is a complex world. There is lots of evidence that the use of models improves decisions. In fact, evidence shows that using lots of models helps even more.

Models help us organize information, make better and faster decisions and develop and adopt more effective strategies. Given the amount of data in the shopper discipline, it should be no surprise that models are useful. However, there is no question that among all of the described ways of knowing about shoppers, model-building is the most complicated and requires much technical skill.

The model's ability to rapidly simulate a market or environment and reveal the consequences of a change or disruption is invaluable. Pepsi built a model of workplace beverage consumption that illustrates this. The workplace shopping environment is data-poor. Beverage sales can only be captured through survey or diary methods. We modeled a 35-employee business whose office was in an office park to understand potential influences of consumption and purchase. The model development allowed for continuous comparison between our hypotheses from survey analytic work, real-world observations and the model. Model assumptions were adjusted to gain harmony among the sources. We then simulated the effect of different marketing and sales tactics on outcomes.

Prior to modeling, most research identifying characteristics of workers, demographics and consumption patterns implied that the only way to grow was to make access to beverage consumption as ubiquitous and easy as possible. Modeling simulations revealed a surprising tactic. The optimum vending strategy was to place machines in the building's lobby, not close to the offices. As few as two machines in the lobby accounted for as much consumption and sales as four times that number on the office floor. The maximum exposure to building traffic three times a day drove more consumption and sales than the convenience of having the machine on the floor. Subsequent field-testing confirmed the strategy. One model overcame years of assumptions about the best way to deploy vending machines.

Frankly, it does not always work that way, but models should be an essential tool for shopper work.

Fundamental #5: There is long-term value in understanding

In some cases, we might prioritize accurate prediction over understanding. This is the situation for many digital A|B tests. An algorithm or a test uses the data to discover whether one alternative is better than another. The prediction may produce no insight behind the result and in the world of just-in-time digital ad delivery and algorithmic design, the prediction is often judged enough. While this process may be efficient, it is a big change from the past, where management understanding was a key to success. The need to understand is a foundational reason for market research itself.

Prediction and understanding are related but independent goals of market research and it is possible to separate them. That is a business decision. The complexity of big data and digital environments has increased the frequency with which predictive models take precedence but striking the right balance between prediction and understanding is still required for shopper insight.

While accurate and timely prediction is often essential to leveraging opportunity, understanding is as often the foundation for innovation. Ancient Babylonian mathematicians were extremely good at predicting eclipses and other astronomical phenomena but it was not until 800 years later that Ptolemy began to understand how the planets and sun functioned in the solar system. Ptolemy's insight led to far more innovation than just knowing when an eclipse would occur. Understanding why something happens is still important.

These overall processes and questions of shopper insight endure but smaller, tighter, seemingly important and urgent questions appear, driven by perceived crises, fire drills and novelty. Despite the trend, e-commerce is still in its infancy for many categories and its knowledge base is fairly shallow. At an advisory meeting for the fast-growing e-commerce arm of a large retailer, the head engineer reported finding they were continuing to deliver ads to customers who purchased expensive products post-purchase. He announced they were discontinuing that "inefficient" process immediately. A few veterans informed him that continuing to view advertising after big-ticket purchases is common across many categories and cutting them off would hamper the store's ability to cement loyalty and convince the shopper they had made the right decision. The engineers had no exposure to wider learning about shopper behavior and their logically optimized decision was not optimal in the broader context of marketing.

Generating much anxiety

The current situation is forcing the accelerated adoption of online shopping tools and generating much anxiety about the collective uncertainty of the future. However, sometimes we know more than we think, if we will only stop and see. Although we will never know everything, we can use these fundamentals to ask good questions and to know enough to make good decisions.

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••• shopper insights

The aisles have it

Using in-store behavior analytics to bridge the gap between surveys and sales

| By Rajeev Sharma

snapshot

Rajeev Sharma looks at what retailers and manufacturers can learn from watching how shoppers shop.

www.quirks.com/articles/2020/20200710.aspx

Endcaps and other secondary product displays are crucial components of the shopping experience. They are the most important way for product manufacturers to stand out and reach busy, time-starved shoppers in-store. And they also are the area where out-of-store marketing meets in-store marketing.

Yet while retailers and manufacturers have proven the positive impact of displays and studied the impact of pricing on buyer behavior, there is a lack of data-driven insights on finer details of display activity: What is the optimal design and content of a display? What is the optimal location for a given display? What types of displays have the most stopping power? What factors are more or less influential on shoppers making a purchase decision?

As today's retail environment is continually and rapidly changing, especially in light of COVID-19, addressing these questions with fact-based insights will yield more optimized performance for both retailers and manufacturers.

The discussion in this article revolves around the grocery channel based on VideoMining's work within that channel but the general concepts can apply to a variety of situations in any brick-and-mortar retail environment.

Skims over critical points

Traditional market research methodologies, such as focus groups and surveys, do a good job at tracking consumer sentiment. That information typically links in with sales data, which tracks market factors. But going straight from preferences to sales means you only infer what happens within the store itself. However, with over 70% of purchase decisions reported to be made in-store, merely inferring in-store behavior skims over the critical points of potential influence for a majority of shoppers.

Even more direct methodologies such as shop-alongs or shopper intercepts can fall short, because people act differently when they know they are being observed. Sometimes, they simply may not accurately remember their shopping trip at the level of detail needed to produce good data.

A powerful example of this was a VideoMining client who created a meal

solutions endcap display – a concept featuring multiple complementary products designed to make building a meal simple and affordable. To research its effectiveness, our firm performed shopper intercepts alongside unobtrusive in-store behavior analytics. Seventy-three percent of surveyed shoppers said the endcap was a "viable one-stop meal solution." But only 7% of buyers actually purchased more than one category from the endcap!

Another recent example comes in the wake of the COVID-19 pandemic. In grocery stores, shopping time (the amount of time a shopper stops to engage with the products on the shelf) decreased over 10% across all categories immediately following the outbreak. That clearly demonstrates how outside factors can impact what shoppers do within the store and where and when they are open to influence.

In-store behavior analytics can bridge these gaps – between preference and purchase decision, between shopper and consumer, between shopper and buyer – by directly and unobtrusively measuring shoppers at the moment of truth. The goal is to capture what really matters to shoppers at the point where they vote with their wallets, without having to rely on their memory or honesty.

Reach out to shoppers

Displays are one of the most direct in-store applications of shopper marketing. It's the one area where any brand, retailer or product manufacturer can reach out to shoppers in the store on their own terms (for the right price, of course).

Displays serve a variety of purposes in grocery stores, such as encouraging impulse purchases, reminding shoppers of a product late in their trip, promoting the discovery of new products and serving deal-seeking shoppers. All of these behaviors serve to build baskets without necessarily cannibalizing the primary aisles for these categories, leading to a win-win for retailers and manufacturers.

Because of the dynamics of retailer and manufacturer relationships, and the fact that display infrastructure is built into the shelves of the store, display areas are effectively a sunk fixed cost. The investment is premade regardless of results, so optimizing display activity achieves benefits for the same end price.

Three metrics

The key historical barrier to understanding the value of display locations is the lack of in-store data. VideoMining's technologies aim to address this gap by measuring real in-store shopper behaviors with video and Wi-Fi sensors.

Specifically, three metrics address total display performance – including incremental sales generated by the display as well as the display's ability to drive traffic to the primary stocking location of the categories on display – in order to assess the value of the display in its location:

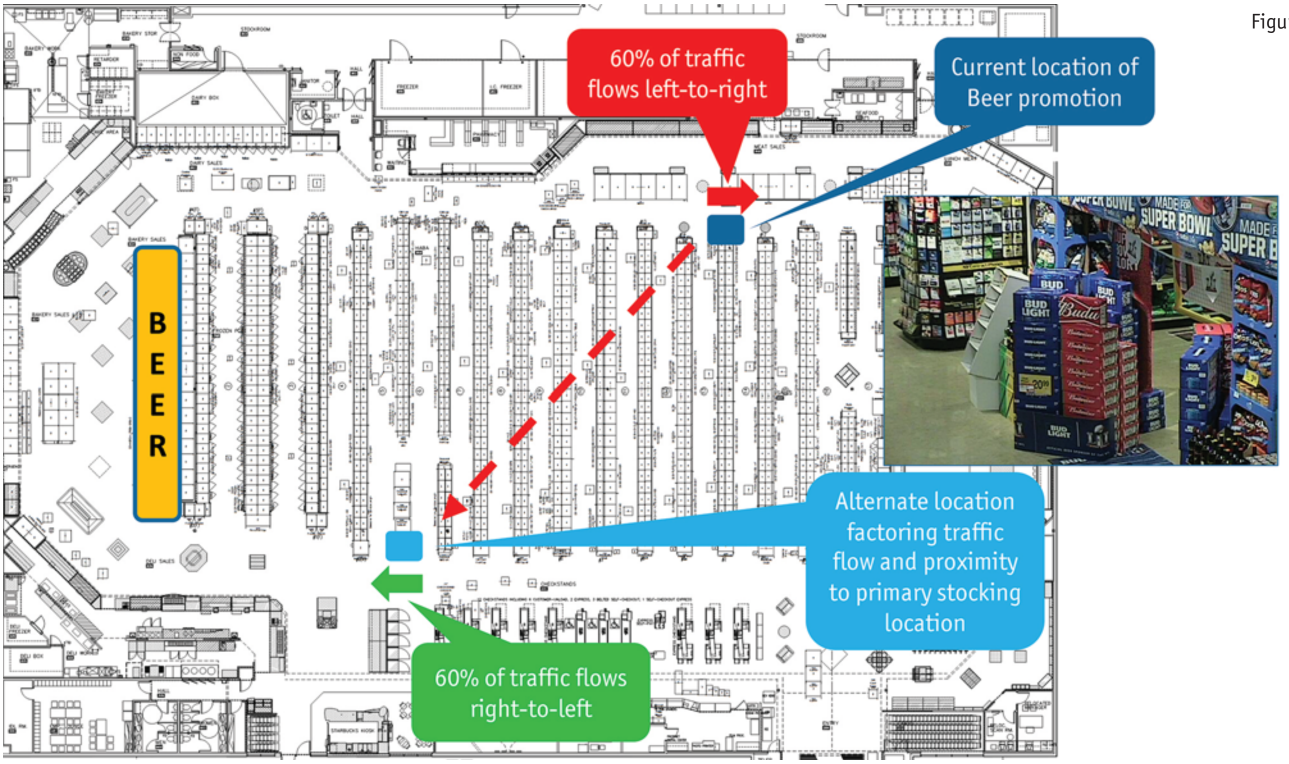
Exposure rate measures the amount of traffic that passes a particular location relative to total store traffic. This metric can be used to compare locations within a store to determine which ones receive more traffic than others.

Engagement rate measures the rate at which passersby take interest in the items at a location, including visual or physical interaction with the items. This metric represents active shopping for people in that part of the store.

Relative directional traffic flow measures how much of a location's traffic is moving toward another specific location. This metric can be used to determine the traffic dynamics in relation to the promoted item's primary stocking location or even a complementary product or category. For example, a salsa display could be used to encourage shoppers to make a trip to Salty Snacks (for complementary tortilla chips) as well as Condiments or International Foods (primary stocking locations for salsa as well as complementary products). It all depends on the layout and assortment of the store along with the desired result of the promotion.

We aggregate the paths of individual shoppers using AI and machine learning to develop a general understanding of how traffic flows through the entire store. Only by understanding the flow of traffic on the macro level can you begin to understand how traffic flow affects the performance of individual displays and their locations.

Figure 1



Based on folklore

Our research has shown the location of a display can impact its performance by as much as 600%. Yet the assignment of display locations to specific promotions is often based on folklore and historical practices, not data and facts.

A Category Management Association whitepaper (Revolutionary In-Store Insights: Endcap Displays and the Shopper) laid the framework for the discussion on display locations. This paper made two important contributions to the industry's understanding of display location performance:

Some display locations are inherently more valuable than others. An obvious example to illustrate this concept would be to compare an endcap facing a high-traffic perimeter category such as the meat cooler to a secondary display tucked in the back corner next to the bathrooms. The endcap by the perimeter category will obviously have more eyes on it, making it a more valuable location to place any display.

Display performance depends on stocking locations of the products displayed. Display performance will be affected by the primary location of the products displayed as well as the location of categories complementary to the products displayed. This depends on how shoppers typically shop the displayed categories as well as the order in which a typical shopper will encounter the different locations.

Without data-backed research, manufacturers are just guessing about which location is optimal for their display and retailers are just guessing the value of their display spaces.

And while the actual display placement decisions are not made by the manufacturer, any improvement in display locations adds to the effectiveness of their spending. Manufacturers' trade spending can be one of the primary sources of leverage in the retailer-manufacturer relationship. A manufacturer armed with data-driven insights that lead to improved display outcomes can demonstrate category leadership and put themselves into better position to influence other category decisions.

Therefore, any work to optimize the locations of displays will enhance this effect and continue to be a win-win. This idea leads to a few key questions that address both perspectives:

- What is the best location for a given display?
- What type of display would best fill a given location?
- What is the ideal combination of all displays across the entire store?
- What is the monetary value of a specific display location?

The answers to these questions guide decision-making by both retailers and manufacturers from tactical, day-to-day display decisions as well as broad, strategic decisions. This makes research on display location useful for the practitioner up through the leadership levels of any retail organization.

While this article only goes into detail on display location, many of these same data-driven methods and principles are applicable to other elements of optimizing displays, such as pricing, pack size, assortment, visual elements, the physical construction of displays and more. For any display activity, measuring shopper responses at the shelf is the most accurate way to quantify the effectiveness of a given display.

Location best practices

Our firm works with retailers and manufacturers to study the effectiveness of different display locations using in-store behavior analytics, including suggesting alternatives to existing display concepts. The final output is a set of location best practices that can then be broadly used by the sales organization when negotiating trade marketing.

For example, to support the launch of a new product, a manufacturer may choose to use an endcap on the primary category aisle to highlight the new product to loyal buyers of that category. Alternately, a secondary display in a high-traffic area or near a complementary product may also be effective. By measuring shopper responses to these displays in real-world shopping scenarios, you can understand the effectiveness of new product displays to ensure that the current product launch succeeds and that future product launches in the category can apply those principles.

Similarly, many displays support occasion-based marketing, whether that occasion is seasonal, a holiday or even a trip mission (such as snacking, taco night, cooking out, breakfast). All these occasions will require different approaches depending on the type of display, number of categories displayed and the layout of the store in regard to the primary stocking locations of the products on display. These factors all can affect the performance of a display and determine whether shoppers are influenced to make a purchase.

Furthermore, not all displays have the same goal. Some displays are intended to be a one-stop shop for a set of complementary products that will build baskets by driving sales of the products displayed. Other displays serve secondary functions, such as driving traffic to the primary stocking location, reminding shoppers of impulse products at the end of their shopping trip or highlighting price promotions. In the wake of COVID-19, grocery retailers instituted one-way aisles, so displays could be used to provide alternative stocking locations to prevent a nearby category being blocked off from a high-traffic area. The ideal location of a display depends on its primary goal and it takes a detailed understanding of display location principles to be able to optimally place a display to satisfy its goals.

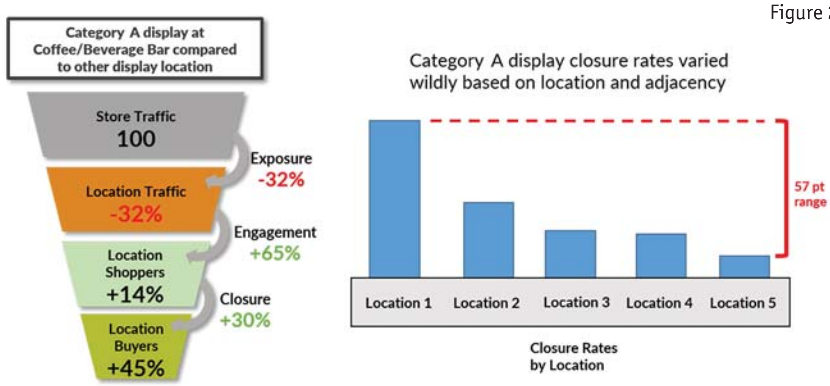
There is a balance of influence between a location's inherent value, a display's specific value in a given location and the contents of the actual display itself. Conducting research in-store accounts for those factors in order to optimize the display for real-world shoppers in real-world stores.

Case studies

Beer promotion

In the grocery store depicted in Figure 1, a beer promotion was located in the back of the store in an area where traffic predominantly flowed away from the primary stocking location of beer. Analysis of a variety of alternate locations ultimately found that due to the direction and amount of traffic, a location in the front-left of the store would improve this

Figure 2



display's performance. This suggested alternate location could then be used in other stores with comparable traffic flows and layouts in order to generally improve performance of this promotion.

C-store

In this example, a product manufacturer tested multiple locations for a convenience store display. While the display at the coffee bar received less traffic, increased shopper engagement and closure led to more buyers and revenue when compared to other Category A display locations (Figure 2). This proved to the manufacturer that even though the coffee bar was not the obvious choice, shoppers were more likely to make an impulse purchase of their products when they were already engaged with preparing their hot drink.

Informational kiosk

This final case study involves a product manufacturer that had developed a new informational kiosk for grocery stores. This kiosk guided shoppers through selecting the correct product for their needs in a complicated category.

This kiosk tested well in focus groups, with users reporting a satisfying, easy-to-use experience and indicating that the kiosk did its job to help inform shopping decisions. However, when placed into a real store, the kiosk did not produce nearly as much sales lift as expected.

The manufacturer reached out to us to test what could be causing the problem. In-store behavior analysis found the simple solution: the kiosk was on the wrong side of the aisle! Store traffic flows favored the other side by almost 2:1 so potential shoppers were not even exposed to the kiosk.

Switching the kiosk to the other side yielded a 6% increase category interaction and a 10% increase in dollar sales per shopper. The kiosk itself was performing admirably but the outside influence of macro store traffic flows kept it from performing at its best in its initial location. Without analyzing the store traffic flows and shoppers' at-shelf interactions, the manufacturer would not have been able to reconcile the positive results from the initial research with the poor real-world performance.

Closer to true motivations

Hopefully, this article illuminates some of the benefits of conducting research with in-store analytics for display optimization and why for any given display, testing assumptions in the real world rather than prompted environments gets closer to the true motivations of shoppers.

In-store behavior analytics can provide the insights needed to improve the decision-making process by marrying sales trends to in-store behavior analytics that quantify traffic flow and at-shelf behaviors of real shoppers. This information powers research that can then be used to develop guidelines for best practices for use in optimizing displays across many retailers or store types. In doing so, all stakeholders will benefit, as existing display budgets will generate the highest possible return on investment. And these fact-based insights help to bridge the gap between departments and teams within an organization, empowering a more cohesive marketing and sales plan.

Displays are the most potent advertising space in grocery stores. Just like how print, TV and online advertisements are measured for reach and impact, in-store advertising via displays must be accurately measured in order to inform future campaigns and optimize every marketing dollar.

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We Are Deeply Grateful to Everyone Who Contributed To This Effort

Marketing Research Education Foundation, MREF

John Ackerman
Melanie Ackland
Jude B
Felix Battig
★ Benenson Strategy Group
Ilana Benusa
Mike Berland
Ileen Branderbit
Daniel Brousseau
Nicole Caldarelli
★ Ed Ceraso
Simon Chadwick
Paul C.
Kiko Chen
Andrew Claster
Calista Corley
Suzanne Costa
Laura Craig
Ryan Crawford
Shannon Danzy
Andra Davidson
★ Delvinia Group of Companies
Sanjeev Dixit
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Emily Koenig Hapka
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Kevin Lonnie
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Mitch Markel
★ MarketVision
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Michael May
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Tyler McMullen
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Yameen Tejpar
Christopher Tonay
Evan Tweed
Tim Urmston
Beth Uyenco
Jennifer Walker
Susan Waltman
Cindy Wark
Connor Weiss
David Wenger
★ Gary White
Leslie Willis
Ken Winneg
Bety Ziman
Howard Ziment
Gary Zucker

★ These organizations made gifts of at least $1,000 to this campaign

••• shopper insights

Tell them to get lost

Using mystery shopping to find CX/UX pain points

| By Elaine Buxton

snapshot

Elaine Buxton explores how a qualitative approach to mystery shopping can show companies where consumers have trouble interacting with them.

www.quirks.com/articles/2020/20200711.aspx

Modern in-store customer experience is complicated. Omnichannel is omnipresent and creates either smooth experiences or customer service nightmares. The in-store journey is a series of customer experience (CX) and user experience (UX) touchpoints, woven together like a spider's web. Every touchpoint is a place to train the customer on what to do next. UX would call this being "intuitive." CX would call this having "ease of use." Those intersections between CX and UX, between the personal and the digital, can become pain points for customers.

In an organization, UX and CX each work together toward success. At its simplest definition, the realm of UX encompasses customer interactions with apps, websites, in-store technology and digital signage. The in-store experience in total falls under CX. Within an organization, there can be multiple owners of UX (tech, IT, developers, facilities management, engineering, design) and multiple owners of CX (marketing, operations, human resources) with the research function potentially serving all of them. When pain points arise, who owns the pain and who owns the remedy?

Corporate researchers bridge this gap and balance these all the time. Research creates data that can be respected by all parties. When research is involved early and often, data can provide specific direction to owners of UX and CX and, ultimately, reduce or eliminate pain points.

For the in-store experience, applying traditional in-store research methods, in traditional ways, does not always find those pain points. Mystery shopping is an example of this. In the traditional sense, mystery shopping is a prescriptive type of in-store, quantitative, observational research. Mystery shoppers are sent to observe conditions and interactions and report back on findings. The required observations (Did this happen?) are based on a list, or prescription, of what should be happening while in-store, which the client has determined will con-

stitute success. There are many good use cases for traditional mystery shopping which create valuable data for managing known processes but this method does not always uncover those UX/CX pain points.

To find them, use mystery shopping in a qualitative way to report on what happened. This gets at the heart of issues customers do not typically tell you about which create roadblocks to success. To do this, give mystery shoppers tasks to do and learn from their attempted journeys. Unlike traditional mystery shopping, which collects data points from specific, observed processes, this qualitative approach collects verbatims from which new insights and opportunities can be found.

As with any study, use reasonable sample sizes for the purpose at hand to produce reliable results. And, when possible, match elements of the mystery shoppers' situations to the task. Mystery shoppers can be selected based on demographics, psychographics, familiarity with the store or other characteristics to realistically simulate customer journeys.

Here are some examples of how to use mystery shopping to find pain points.

Send mystery shoppers to go find the omnichannel pain

Omnichannel can bring omni pain points. A simple way to discover the pain points is to dispatch mystery shoppers to order an item online, await confirmation and go to the store to pick up the item. Or send mystery shoppers to the store to find an out-of-stock item and place an in-store kiosk order and await product delivery. Rather than asking for a report on "Did this happen?" (quantitative, traditional approach) ask for reporting on what happened (qualitative, nontraditional approach).

When using mystery shopping in this qualitative way, it is important to provide as little direction as possible. Provide the mystery shopper with the task but do not provide too much detail about how to accomplish it. The goal is to seek out what confused the mystery shopper when left on their own, as a customer would be.

Studies such as this have revealed key CX-UX disconnects within the in-store experience. For example, buy online/pick up in-store (BOPIS) creates a large set of possibilities for disconnects between UX and CX. With BOPIS, the personal and digital interact in multiple ways. A study using mystery shopping qualitatively – in the nontraditional way – found many pain points within the same organization:

- Online order confirmation e-mail wording was not the same as in-store signage wording, causing confusion for the customer.
- Online order confirmation appearing on screen after ordering showed different store hours than those included in the e-mailed confirmation to the customer.
- Available pick up times shown on the order confirmation e-mail were later than the times the store was scheduled to be open.
- In-store kiosk orders had the same wording as online order confirmation, making it sound like the customer ordered online when they were really in the store ordering. This created some confusion.
- In-store department names were described differently in-store than on the store's smartphone app.
- An in-store ordering kiosk required customers to request a purchase receipt before the transaction and gave no option to obtain one at the end of the transaction.
- For the same store, online orders for printing simple business cards were promised within two hours if ordered online and promised within one day if ordered in-store. This was because the store did not have the capacity to accept the number of orders coming in, so store employees were quoting longer print times.

Send mystery shoppers to get lost

Wayfinding can be particularly tricky in some venues, such as airports, sports arenas, shopping centers and big-box retailers. Getting lost can be especially frustrating for in-store customers. And, considering that modern stores have traditional printed signage and digital signage, there is ample opportunity for pain points.

Using mystery shopping in a nontraditional way allowed for a wayfinding study to deploy mystery shoppers to get lost, literally. Shoppers were sent to specific starting points at an airport, from which they would attempt to find specific end points without using navigation devices. Mystery shoppers, selected because they were unfamiliar with the airport, were assigned to navigate onto airport property using signage only and try to figure out how to get to parking, passenger drop-off, the cell phone lot, etc.

The study identified many issues: parking signs blocked by trees; signs placed where drivers had little time to change lanes; signs that could not be read at night; and user-experience entry and exit confusion points at parking lots. Signs at one concourse entrance were ill-placed and passengers had trouble finding their flights. Arriving passengers could not find where to go to get rental cars, as only signs for "Ground Transportation" were in place.

Results of this study informed the airport's decisions prior to spending millions on an upgraded signage system.

For another study, this one inside a big-box retailer, mystery shoppers were told to find specific items on the company's smartphone app, noting the aisle and shelf number of the item on the app. While at the store, the mystery shopper was tasked with locating the item. Findings revealed that not all items were correctly located inside the store. Further, store employees were using that same app try to locate items for customers and simply quoting the aisle and shelf number of the item when mystery shopper asked where to find the item. Clearly, this was a disconnect all around, with mystery shopping research identifying the issue.

Send mystery shoppers with a persona-driven purchase intent

Omnichannel can mean omni-persona. Customers move in and out of personas, based in part on their purchase intent.

Using mystery shopping in a nontraditional way allowed a computer purchase study to find pain points among four purchase personas. Mystery shoppers were screened and selected to meet specific criteria for real personas, then tasked to go on a specific purchase path and report back on what happened. Personas included "gamer," "tech newbie," "tech manager" and "needs connections."

Results of the study found that store associates were well prepared to sell to "tech managers," "gamers" and "needs connections" but were less adept at selling to "tech newbies." Most importantly, the study revealed that the "tech manager" who needed a PC for business use might also be "needs connections" for a home PC or a "gamer" for personal use. The study revealed that the amount of knowledge the customer had about PCs did not determine the success of the in-store experience; the ability of sales to meet the persona or purchase intent did. Results of the study were used to train store staff, create additional information for customers and inform a new marketing approach.

A mystery shopping study inside quick-service restaurants (QSR) helped a client determine the best path toward a migration to kiosk ordering. Years ago, when in-store tech first started evolving, the assumption was that digital would immediately replace current methods of serving customers. This did not materialize. For example, self-service checkout did not replace cashier-assisted checkout in grocery stores, it simply evolved into operating as an option for customers. The QSR company wanted to find the best way to introduce kiosk ordering without alienating customers and without simply converting and leaving some customers behind.

Mystery shoppers were tasked with visiting multiple restaurant kiosk-ordering configurations at multiple restaurant companies and were asked "What happened when you went to place an order?" Results boiled down to three buckets of options: 1) restaurant employees used the tech (tablets); 2) ordering-kiosks were available with no assistance; and 3) ordering-kiosks were available with employees there to train customers on how to use them. During the study, mystery shoppers who encountered employees using the tech, such as carrying mobile ordering tablets, reported that employees seemed preoccupied – attending more to the tablet than the customer. The kiosk-only option was frustrating for mystery shoppers as they tried to navigate learning how to order at an unfamiliar restaurant. The study informed the company's decision to deploy kiosks to the dining area along with an employee to train customers and served as proof that every UX/CX touchpoint is a place to train customers.

Bridge the divide

Tasking mystery shoppers by persona or purchase intent provides laser-focused insight into the experience of customers as they interface with people and digital. This nontraditional, qualitative use of mystery shopping can be deployed to find CX/UX pain points and to prove or disprove insights from focus groups, exit interviews and customer surveys. It is also a clear research method that can bridge the divide between tech and people, CX and UX, the digital vs. the personal. Results can start and keep conversations going between various owners of the customer and user experience to create seamless touchpoints for customers.

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••• shopper insights

A healthy interest

With better-for-you foods, what claims are consumers buying?

| By Antje Sardo

snapshot

Studies examine consumers' pre- and post-pandemic perceptions of clean-label and similar food and beverage trends.

www.quirks.com/articles/2020/20200712.aspx

The health and wellness foods category has expanded steadily over the past few years, with some sources reporting a growth rate more than double that of the total food and beverage retail industry. Consumers are shifting their purchasing towards better-for-you foods and beverages and are on the lookout for products that claim to offer health benefits.

Food and beverage companies are readily jumping on this trend, promoting their products with claims that convey they are better (or healthier) for the consumer and launching new products to meet increasing market demand. Retailers have also adjusted to this shift and are offering consumers a wider variety of healthy options to choose from. The growth of this previously niche category reflects an evolution in consumer mind-sets and lifestyles and looks like a trend that will continue into the foreseeable future.

To complement the work of our food and beverage clients, GutCheck decided to conduct our own research to explore the better-for-you food and beverage space. We wanted to be able to answer client questions such as:

- How important are health considerations to consumers, especially when compared to product prices?
- Which better-for-you claims are most important to consumers?
- How do different generations view the better-for-you space?
- What do consumers think about "clean" claims and where do those claims fit?

At the end of 2019, GutCheck conducted an online research study with 7,000 respondents, representative of U.S. adult food and beverage consumers and balanced by gender, age and region. Although mostly quantitative, the survey allowed qualitative input through open-ended

answers and video upload options and also linked respondents with their behavioral data from various sources through GutCheck's data management platform provider.

While this initial research was extensive and wide-ranging, it was also completed prior to the COVID-19 pandemic. Knowing that the pandemic and its stay-at-home orders would likely impact the food and beverage retail space, two additional waves of the same study were conducted to determine any meaningful changes in consumer behavior.

So, how are consumers shopping? Below are some of the most interesting findings from our research related to how consumers purchase better-for-you food and beverage products.

Health matters. Consumers pay just as much attention to the health benefits a product offers as they do to the product's price. In fact, 56 percent of our respondents stated they do actually read the ingredient label and take that information into consideration when making a purchase.

So does price. Approximately two-thirds of those who shop mainly with health in mind are also looking for the lowest price. However, considerations do start to shift more towards health priorities if consumers have a very specific health focus. For instance, if someone is dieting and paying close attention to what they feed their body, or must avoid certain foods or ingredients (e.g., lactose or gluten), they are less concerned with price than others might be.

Target younger audiences with better-for-you claims. Millennials (ages 23-38) stood out in our research as the generation placing the most emphasis on healthy food and beverages. This fits with their general lifestyle: our behavioral data emphasizes that Millennials are twice as likely as the general population to be on a diet, go regularly to the gym and go running. However, it is important to note that Millennials still pay just as much attention to a product's price as they do its health claims.

Taking care of the environment. Millennials are generally known as a group that is very environmentally conscious, with many leading the charge on eco-friendly initiatives. This extends to their food and beverage purchases as well. While those claims are not as important to them as health and price considerations are, we noted that Millennials are more receptive than other age groups to products that emphasize environmentally friendly and sustainable practices.

Taste is king. No matter what type of food or beverage product they purchase and what the consumer's individual priorities are, the most important aspect to the purchase decision is that the product tastes great: 67 percent of consumers find taste or flavor important and 51 percent say that the quality of ingredients used is a critical purchase driver (Figure 1). While quality ingredients are more important to consumers on the lookout for healthy products or those searching for specific products that fit their dietary needs, taste remains the No. 1 priority for consumers across the board.

Youth shows less loyalty. Millennials and Generation Z are less likely to rely on previous food and beverage experiences than Baby Boomers, meaning they are more likely to try different brands and products they may not have consumed before. They are therefore the core target for new food and beverage products that are introduced to the market, especially if those launches are in the healthy product space.

Increasingly interested

As previously mentioned, consumers are increasingly interested in healthy products and are purchasing more food and beverages that display better-for-you claims. In fact, 65 percent of respondents state that either "most" or "some" of the products they buy fall into the better-for-you category.

This is especially true among consumers who have a special interest in healthy prod-

Figure 1

ucts. Those groups include:

- Millennials, approximately half of whom are currently on a diet or continuously follow dietary restrictions;
- parents looking out for their children and families;
- consumers with a special focus on health and fitness;
- consumers who follow a diet (either a general diet, like vegetarian or flexitarian, or more specialized, like gluten-free or vegan).

Generally, consumers consider better-for-you products as anything they perceive to be healthier than other available options. When asked on the spot which claims fall into this category, "organic," "no or low sugar," "reduced fat" or "fat-free," "natural," "non-GMO" and "low sodium" are mentioned most often.

Interestingly, protein does not appear as an important claim right off the top of consumers' minds. However, when prompted with a list, protein emerges as the better-for-you claim that consumers find most important. We believe this is because they view protein less as a marketing claim and more as an ingredient. Calling out a specific ingredient is a credible claim and therefore is a major influence in the consumer's purchase decision.

Besides protein, better-for-you claims around low or no sugar, no artificial ingredients (preservatives, flavors, fillers and sweeteners) as well as natural, resonate strongly with a broad consumer audience.

While these claims are important to Millennials, protein stands out as the one most important to them. Additionally, "organic" and "clean" claims also resonate strongly with this age group, more so than with other generations.

To summarize our better-for-you findings:

- Millennials are the most receptive generation to better-for-you claims and should be the core target audience for food and beverage products playing in this space.
- They are also more open than older generations to give new products a try, so aiming new healthy products toward Millennials is advisable.
- Protein claims resonate particularly well with Millennials and they are more inclined to find "clean" claims important.

No clear-cut definition

What are clean-label products? The fact is, there is no clear-cut definition. While the Food and Drug Administration has not defined what clean-label entails, it is generally considered to be natural products containing ingredients that consumers are familiar with and easily recognize and contain no artificial ingredients or synthetic chemicals.

Millennials lead all age cohorts in reacting positively to clean claims. In fact, 21 percent of Millennials state they exclusively try to purchase food and beverage products that are considered clean. Seventy-one percent of Millennials are also prepared to pay a little extra for food and beverage products that are clean.

However, at a general consumer level, clean claims are not that impactful, yet: 59 percent of consumers age 18-65 claim that clean claims do not impact their purchasing, either because they have never heard of clean-label, don't know what it means or simply don't find it compelling enough to affect their purchase decision (Figure 2).

The issue is that clean-label seems to have a bit of a labeling problem. Consumers interpret much more into clean than intended and this is particularly true for Millennials. Not really surprising, since there is no official or regulated definition. Purchasers create their own meaning and can include claims such as: safe for the environment; organic; non-GMO; sustainably-sourced ingredients; plant-based; premium ingredients;

Figure 2

Awareness and Purchasing of Clean-Label

locally grown (Figure 3).

None of the above terms are a part of the core meaning of clean-label, yet consumers associate them with this claim. The general lack of understanding and misconception around what constitutes clean products may hinder their growth potential. However, these misconceptions emphasize what is important to consumers and what they associate with clean.

What does this mean for companies who play in the clean-label space?

- Have a clear understanding of who the clean-label shopper is. They are more likely to be Millennials, tend to be more focused on health and dieting than general consumers and are more likely to shop online, at health or specialty stores like Whole Foods or at club stores.
- Market products to the clean target. Due to a blurred perception of what the term means, brands can control the conversation and educate consumers on what the clean category includes and why their product fits.
- Consider other causes important to your target consumer, such as environmental impact and sustainability, and find ways to incorporate those into your messaging and marketing.

Much more health-focused

Everything mentioned up to this point confirms that Millennials are much more health-focused than other generations when it comes to the foods and beverages they purchase and consume. And that makes sense, since behavioral data suggests that Millennials are twice as likely as the general population to: be health-conscious and focused on eating well; stay fit; pay attention to their overall wellness; maintain a diet and active lifestyle by participating frequently in outdoor sports, running regularly and going to the gym.

How do other generations differ from Millennials?

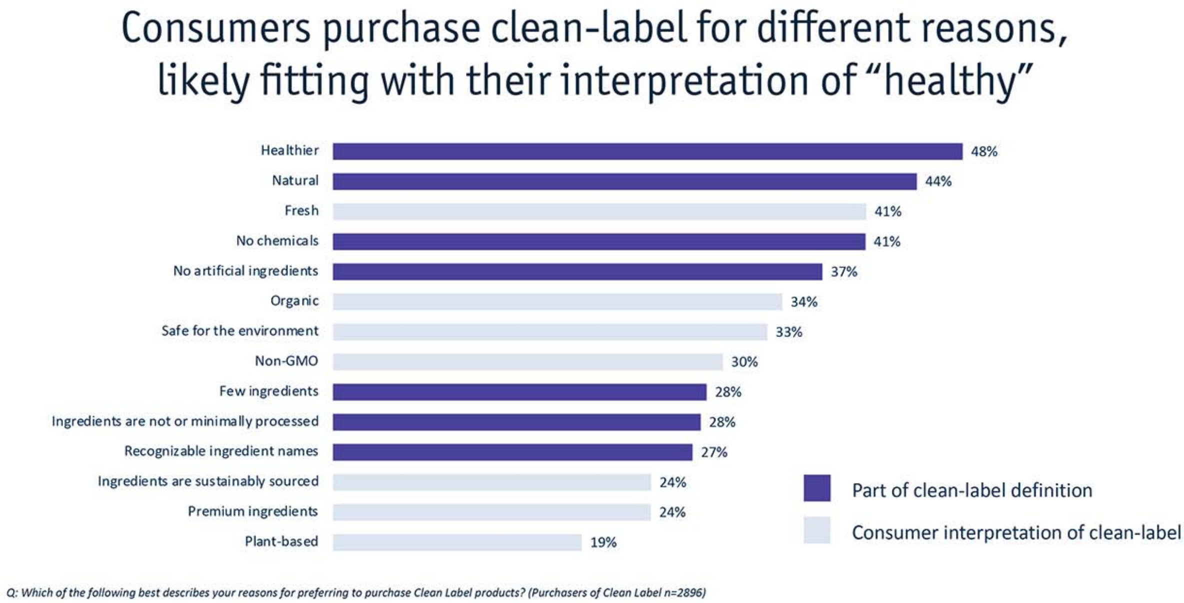
- Generation Z (aged 18-22) also care whether the products they purchase are healthy and have limited impact on the environment. While not as committed to these causes, they are still paying more attention to them than older consumers.
- Price plays a major role for Gen Z. With less disposable income available, these young consumers are more concerned about what they can afford, even if they would like to purchase healthier and more sustainable products. The older consumers are, the less focused they are on searching for the lowest-priced products.
- Older generations, like Baby Boomers and to some extent Gen X, tend to be more interested in gut health, low/no sugar claims and no artificial add-ins in their food and beverages.
- Baby Boomers are the least interested in clean claims. Instead of jumping on the clean trend they are happy with looking for products that display claims like no preservatives, no artificial flavors, no synthetic chemicals, etc. Does this then mean that Baby Boomers are not interested in clean products? We don't think so. Technically, there may be little difference between a "no preservatives" claim and a clean claim. The difference lies more in Baby Boomers' hesitation to adapt to new trends and accept new terminology. Baby Boomers have quite a clear understanding of what clean-label stands for. They just think that established claims like "no preservatives" that they have likely been purchasing for a long time are good enough.

Time will tell

The COVID-19 pandemic has disrupted our lives in the U.S. and elsewhere. Shelter-in-place orders have changed consumers' habits and behaviors. Despite reopening in phases, some of these changes may become the new

Figure 3

Clean-Label Purchasing Reasons



norm, but only time will tell.

As mentioned, we re-fielded our better-for-you study during the pandemic to determine how, if at all, consumer behaviors and priorities may have shifted. The second wave of our research took place between March 28-30, 2020. For reference, by March 30, 30 states had a stay-at-home order in place, while just one week prior, only nine states had such measures in effect. Wave 3 was conducted five weeks later (May 1-6, 2020). At this point about 17 states had just issued some type of reopening order – the extent of which varied by state – and other states started to discuss plans to reopen in phases.

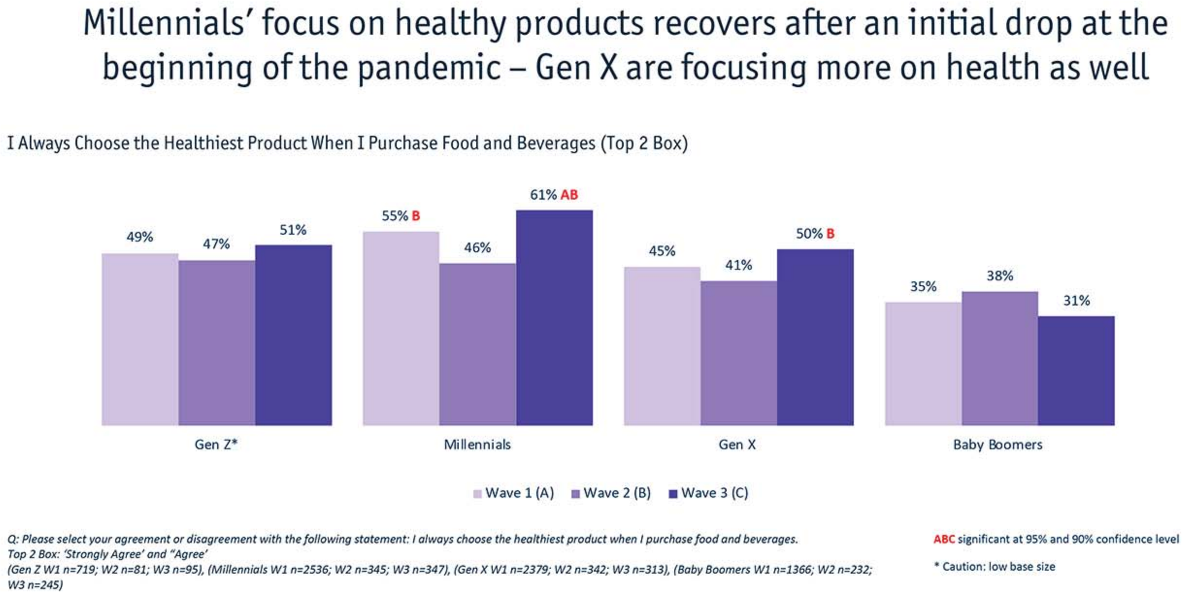
The pandemic indeed had a clear impact on consumers' grocery shopping behavior. A few highlights are outlined below.

Consumers are less focused on the price of groceries. This is likely driven by product availability as well as the fact that consumers make fewer shopping trips. They are more likely to visit only one retailer and condense their shopping time. This allows less time to make their purchase decision if several choices are available. This diminished focus on price became visible early on during the pandemic and is most pronounced among younger consumers (Gen Z and Millennials).

Priorities are shifting. At the beginning of stay-at-home orders, consumers also paid a little less attention to purchasing healthy products, likely driven by the need to stock their pantries to be able to feed themselves and their families over an extended period of time. However, towards the end of the stay-at-home orders, this focus shifts. Grocery shoppers overall regain a strong focus on selecting healthy

Figure 4

Healthy Product Shopping By Generation



products (Figure 4). Especially among Millennials and Gen Z, this focus clearly trumps price considerations and is further emphasized in consumers again paying more attention to reading ingredient labels.

Purchasing what was available

While the importance of better-for-you claims and product purchasing shows little impact during the COVID-19 pandemic, consumers' focus on clean claims was impacted. Likely driven by Millennials focusing on stocking up and purchasing what was available, their focus on healthy and also clean products dipped initially. However, after this initial period, Millennials became used to the new situation and regained their focus on healthy products and, with that, clean claims.

There is even indication that clean claims gained traction towards early May. This may be because consumers are now less focused on price and had a chance to try out clean products during the stay-at-home orders or it may be an expression of a new, potentially more health-focused mind-set that consumers have developed coming out of the first COVID-19 wave.

Other selected insights we have noted since the pandemic began:

- There is an increase in consumers sharing grocery shopping responsibilities with others in the household. With more consumers working remotely from home or having lost their jobs, children being at home all the time and limitations in some states on the number of items allowed to purchase per person, splitting up shopping responsibilities among the adults is a natural development.
- Not surprisingly, with restaurants closed or only open for takeout, online ordering of restaurant food has increased.
- Online grocery delivery services have also gained momentum, particularly in the West and Northeast regions that were most affected by the coronavirus early on. Among Millennials, Gen X and Baby Boomers there were sharp increases of up to 10% in first-time online delivery ordering. These new users of online delivery are not only trying the service out, they are using these new services at least every two to three weeks. They are creating a habit that may well carry on after the pandemic.
- In addition to the online shopping explosion – which is driven by the social distancing rules – we also see some impact on retailers. Consumers are shopping more at club stores while some discount stores show declines in shopping visits. With the regained focus on healthy products, health food stores gain back some traction.

Bound to follow

What does this all mean in the long run? Millennials – with their confirmed focus on better-for-you food and beverage choices – are leading a trend that other age groups are bound to follow. With price concerns falling behind, the door to selling healthier, wellness-focused products is opened even further and we expect consumers to continue making healthier choices.

In fact, the rise of health and wellness products may even accelerate after the pandemic. The growth of online shopping could also lead to an increased variety of healthy products that will be available to consumers. However, once we are no longer sheltering in place, economic considerations may again start to impact consumers' choices more than we are currently seeing, as we expect product and price comparisons to again play a bigger role in informing consumer decisions.

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shopper insights

Real staying power?

Move over recycling, some new trends are in town

| By Jennifer Wehr Holt and Bridget Nichols

snapshot

The authors examine findings from their study of generational views on topics like sustainability, recycling and organic food.

www.quirks.com/articles/2020/20200713.aspx

In the past decade, few things have changed as rapidly as retail shopping. Thanks to disruptive fads, trends and the innovations of a few key players, consumers now hold more control and more power over retailers than ever before, for one main reason: they have more options than ever. And the more options you have, the more power you have.

We have more stores, more ways of shopping, more delivery methods and more products than the largest superstore can hold. If Amazon doesn't have it, Apple didn't innovate it, Alexa doesn't know it and Google can't search it, does it even exist?

We live in a world where immediate gratification isn't fast enough to keep up with increasing demand – for fast delivery, low price, good value, high quality. For products that are recyclable, sustainable, natural/organic and locally-sourced.

And do we dare admit that there is a direct, linear relationship between increased customer options and increased expectations? In fact, consumer expectations of manufacturers and retailers for product choices are at an all-time high, yet brand loyalty is at an all-time low of 9% (Nielsen, 2019). So in today's shopping world, disloyalty may be the new loyalty.

Adding to decreasing loyalty and endless product options are the latest trends. Some are merely fads but others are not only here to stay but are gaining traction across all generations. For example, consumers, as well as companies, are increasingly taking on social and environmental responsibility as they become more aware of how their actions affect personal and planet health. Many companies have increased sustainability-friendly product options and have joined the races to fight the battles and win the war by going beyond what consumers thought was possible as far as food choices, shopping options, environmental efforts and trends such as the plant-based movement.

But in the consumers' minds, are these efforts simply the newest

plant-based food, was rated significantly less important: 86% of those surveyed rated recycling as somewhat to very important compared to 82% for sustainability, 56% for natural/organic and only 44% for plant-based foods.

Be more involved

The majority of respondents want to be more involved in recycling (64%) and sustainability efforts (59%) and 71% of all surveyed want to do more than they're currently doing to support these efforts. The largest gap was with Baby Boomers: while 88% of them rated recycling at least somewhat important, the highest of all generational groups, they also rated sustainability the lowest of all groups.

Baby Boomers were the only group that indicated "not having the knowledge/don't know how" as the reason for not being more involved in recycling, while collectively, respondents indicated the lack of involvement was due to it not being convenient, taking too much time/effort and not thinking their efforts have an impact. Gen X and Baby Boomers rated their children as the biggest influence on recycling efforts, while Millennials and Gen Z rated how they were raised/grew up as a strongest influence.

Perhaps it's no surprise that recycling was the top-rated practice in many aspects across all generations but even here consumers do not think it is universally beneficial: 70% of all respondents think recycling has an impact on the environment but only 41% think it has an impact on their health. Three-quarters of all respondents indicated that having "packaging that can be recycled" or "reduced packaging" impacts their purchase decision. This had the greatest impact on purchase decisions for Baby Boomers (79%) and the least impact on Millennials (72%). (It's worth noting that all groups were over 70%.) Although recycling appears to be the most important to Baby Boomers, they're the least likely to pay more for recycled products. Our survey indicated that 57% of Millennials would pay more for a product that could be recycled, compared to 61% of Gen Z

marketing ploy or is there actual substance behind them that influences their purchase decisions? Are consumers really so skeptical of these socially responsible strategies as some suggest? (BusinessWire, 2019)

There is information overload coming from everyone in every direction and often with conflicting opinions. Remember the good old days when noise was actually a sound? People talking, children laughing, grocery cashiers asking how they can help? Today, the noise comes in the form of thousands of buzzwords, advertisements, promotions, claims, options, trends and offers. All of this can be overwhelming when trying to decide: who to listen to and how to listen; what's important and what to buy; what to eat; how to buy it; how to recycle it, etc.

Is this situation an intersection of controlled and correct communication from company to consumer or is it an opportunity gap yet to be capitalized upon? Are companies reaching consumers across generations the right way and putting their efforts where we as a planet need them to? Do these efforts match consumer attitudes, behavior and demand? And how is this different across generations?

Further, what's really important? Who is it important to? And is it important enough to change behavior, impact purchase and loyalty and the price consumers are willing pay?

To answer these questions, we surveyed 1,250 U.S. respondents via an online quantitative study to measure opinions and actions across generations from Baby Boomers, Gen X, Millennials and Gen Z.

Using a five-point Likert scale (very important, somewhat important, neutral, not very important, not at all important), the four main topics tested included recycling (being able to be reused), sustainability (defined as meeting the needs of today without compromising the needs of the future), natural/organic foods and plant-based foods.

The oldest and most well-established practice, recycling, was rated the most important across all generations, while the newest trend, and only 42% of Baby Boomers.

Turning our attention to sustainability, 82% surveyed think sustainability efforts are important and 65% of respondents think their efforts have an impact on the environment but only 46% think they have an impact on their overall health. Seventy-one percent of all respondents indicate they want to be more involved in sustainability efforts, with Gen Z the highest at 77% and Baby Boomers the lowest at only 62%. Of Baby Boomers, 41% indicated they "don't know how to do more/lack the knowledge" to get more involved in sustainability efforts.

Gen Xers indicated their children as the major influencer in encouraging their sustainability efforts while the remaining groups cited the news/media. Although 70% indicated that products that contribute to sustainability have an impact on their purchase decision, only 58% of all surveyed would pay more for those products. Gen Z (68%) and Millennials (65%) would pay more compared to 56% Gen X and only 44% of Baby Boomers.

Even though companies know that sustainability is important, only about 25% have a strategy or initiative in place (Forbes, 2019). The U.S. ranks 27th on the Environmental Performance Index, well behind Sweden, France, Switzerland and the U.K. (Natran, 2019).

Respondents we surveyed also said they want more from companies. Fifty-three percent of Gen Z think companies are "not doing enough/could do more" as far as not harming the environment and practicing sustainability (51%). On a positive note, although most don't think companies are doing enough, 68% of respondents think what the companies are currently doing will have a positive impact on future generations. The largest difference in this expectation is between Gen Z and Baby Boomers. Gen Z (73%) think the positive impact of sustainability efforts outweighs the cost, compared to only 60% of Baby Boomers.

Feel good about their efforts

In general, consumers feel good about the impact their efforts have on the Earth and its people. Overall, recycling and sustainability were rated higher for contributing to environmental preservation and natural/organic and plant-based foods were higher for contributing to overall health.

Overall, products that are environmentally friendly are seeing a rise in purchasing and growth. A little more than half of those surveyed (58%) are willing to pay at least 25% more for products contributing to sustainability. Gen Z was most willing (68%), compared to only 44% of Baby Boomers. In fact, products with sustainability efforts are on the rise as far as consumer purchasing. "[I]n the U.S., the market is growing rapidly. In fact, from 2013-2018, NYU Stern Center for Sustainable Business and IRI reported that in 90% of CPG categories, sustainably-marketed products grew faster than the category as a whole…. (and) by 2021, Nielsen predicts sustainable product sales to reach nearly $150 billion – nearing a 20% increase from the estimated $129 billion in 2018." (Food Dive, Barry Callebaut Group, 2019)

Other trends that have received increased attention are natural/organic and plant-based foods. This is most important to Millennials (47%), while only 48% total respondents would pay more for plant-based foods. The overall reason given for not eating more plant-based and organic food was cost. Sixty-nine percent of all respondents indicated being organic was important and 64% would pay more. Gen X has the strongest opinion on natural/organics where 60% think this is at least somewhat important. When looking at diet types, only 36% of respondents following the standard American diet think eating plant-based food has an impact on the environment compared to 75% who currently eat plant-based diets. Vegetarian/vegan/flexatarians were all over 65%.

Although this is a new trend, it's making a huge impact! Overall U.S. retail food sales only grew 2.2% for 2019, compared to plant-based food sales, which climbed 11.4% to reach $5 billion (PBFA.org/Spermarketnews.com). In a world of omnichannel retailing and omni-cultures, what happened to all the omnivores? Of course, this trend is also gaining attention not only because some view eating a plant-based diet as better for your health but it's also been deemed necessary as far as planet sustainability and reduced carbon emissions. "One-third of the world's arable land is used to grow feed for livestock, which are responsible for 14.5 percent of global greenhouse-gas emissions." (New Yorker, 2019) However, food manufacturers have already faced challenges keeping up with soy and pea demand. The solution may need to be somewhere in the middle with a variety of plant-based protein options to aid in sustainability and health while at the same time ensuring supply and demand.

They want it all

So, what do shoppers want? Well, of course, they want it all! Looking at the 10 attributes we asked them to rate – free of hormones and antibiotics; made of all-natural ingredients; ingredients sourced responsibly; organic; environmentally friendly; free of chemicals and dyes; contributing to sustainability; having recyclable packaging; plant-based; having reduced packaging – our participants rated all of them as having a great/significant impact on their purchase behaviors, "free of chemicals and dyes" and "made of all-natural ingredients" tied for the highest impact at 79%, while "plant-based" scored the lowest rating at 59%. Consumers are the most willing to pay more for products that are free of hormones and antibiotics (68%).

Although the largest differences are to be expected on the tail ends of the bell-shaped curve when comparing Gen Z to Baby Boomers, overall they're not as dissimilar as we expected. Current economic conditions as well as how these generations grew up certainly come into play. We have to keep in mind that Baby Boomers and Gen X grew up on the big screen and trusted commercials and used coupons whereas Millennials and Gen Z grew up with a library of information and power in their handheld device. The biggest difference could be traced back to the fact that Baby Boomers grew up trusting the information companies gave them because companies held retail power. These are the folks who may remember some of the cigarette ads that boasted weight loss and other health claims. That coin has flipped and Millennials and Gen Z are used to being in control and having power and, often, being skeptical.

We need to remember that we (as marketers) are the ones that empowered consumers when we added the fifth P of marketing – people – to the original four (product, price, promotion, place). Dare we add a sixth – perception – since perception is reality? Adding "people" as consumers gave them a voice and arming them with smartphones gave them power. We changed (or they demanded) that the marketing monologue become a dialogue. Companies did a great job keeping up with this during the days of call centers but now consumers' voices are shouted across social media and can reach millions within seconds. Since life now moves at the speed of a digital snap, swipe or post and viewpoints can be created, edited and shared in seconds, we have to respond with action versus reaction and not just hear what consumers are saying but listen.

Julia Wilson, vice president of global responsibility and sustainability at Nielsen, shares a bit of listening advice: "Options bring opportunity, especially as the spectrum of what's included in sustainability is growing. This goes beyond environmental factors and also includes fair wages, diversity, corporate governance and more. We can all aim to shape a smarter marketplace that contributes to a 'healthy for me, healthy for we' mentality. This starts with strategy. CPG companies and retailers have a big opportunity to shape a strategic approach that is proactive in order to deliver the right information and products to the right people at the right time so consumer needs and preferences can be built into their offerings sooner. Better connections with consumers that starts with trust and transparency will create an enhanced journey for all." (Wilson, 2019)

Pay attention

Our intentions as marketers are often interrupted so it's important that we pay attention to these intersections and close the gaps. A gap can be okay as long as we remember to turn it into an opportunity. If recycling is still the go-to behavior and sustainability is lagging a bit but gaining momentum and organic and plant-based are newcomers, how do we marry these efforts in the consumers' minds so they have the knowledge and power to be as involved as they want? The answer: trust and transparent communication.

We need to keep in mind that consumers are just as risk-averse as companies and the more information they have – that is transparent and trustworthy – the more action they'll take. It takes safety to soar. We need to prove that efforts make a difference, that actions are important and that recycling, plant-based and natural/organic trends are among the many that will fuel and feed us in a sustainable way. After all, the circle of sustainability is the circle of life and we're all in this together.

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••• generations research

Truly just a number

Why marketing based on age cohorts doesn't make sense

| By Adam Cook

snapshot

Author Adam Cook argues that if targeting generations is a part of your marketing strategy, you're not really targeting.

There are a handful of triggers that can achieve a guaranteed eye-roll from yours truly – most of which have nothing to do with marketing or research – but when I hear people talk about Boomers, Gen Xers or Millennials, that's my involuntary response. While some marketing strategist or guru drones on about targeting one of these "generational segments," I can almost hear June Carter and Carl Smith's rendition of "Time's A Wastin'" playing in the background. It's a fitting accompaniment when you consider this song was most popular more than 60 years ago – the same bygone era this kind of targeted marketing strategy belongs in.

Why such marketing blasphemy, you ask? Years of researching, interacting with businesses, reading and simply being able to do some basic mathematics has sobered me up on the reason this form of targeting offers little to no value.

What could possibly diminish such a tried-and-true, much discussed, much deployed, ironclad strategic approach? Five things:

- the origins of generational definitions
- the arbitrary cutoffs in ranges
- the mathematical issue with ranges and aging
- our instinctual preference for simplicity over complexity
- the ways humans relate goes way beyond age

Problem 1: The origins of generational definitions

First, who's the governing body defining generations? Can't readily name it, can you? Yeah, there isn't any. The terms are so much a part of our day-to-day vernacular, we've assumed it must have been established by some respected organization. We've generally assumed that these generations are groups of people that fall between 15-to-20-year increments in the U.S. Not 15 or 20 years on the dot, just slightly random and arbitrarily defined ranges. It all really started with the Boomers – a surge in U.S. births

www.quirks.com/articles/2020/20200714.aspx

following World War II. There were so many kids that infrastructure, education and economies had to quickly adapt and accommodate. These were kids being raised in an era of incredible growth following some of the country's most challenging economies. Media, marketing and consumerism exploded and permeated their entire lifespans.

A better place to start is asking: What is a generation? The definition, based on dictionary.com, is:

"the entire body of individuals born and living at about the same time; the term of years, roughly 30 among human beings, accepted as the average period between the birth of parents and the birth of their offspring; a group of individuals, most of whom are the same approximate age, having similar ideas, problems, attitudes, etc."

There are seven-plus more definitions but these top three spawn a myriad of problems within themselves.

The third dictionary definition alone presents basic observational issues. Given what we know about Millennials, number three simply negates itself. Millennials are in a hyper-niche, multisegment society that is growing exponentially isolated from "the whole" in terms of "similar ideas, problems, attitudes." This notion is enough to take down this house of cards but the truth is, technology and the digital age have diminished mass shared experiences for all, not just Millennials. Problem 2 will tackle the leading two definitions.

In the end, there is no singularly recognized governing organization setting clear standards for definition of a generation but we've convinced ourselves standards must exist because of the omnipresence of generation-based marketing. A strategy without a solid foundation renders the remaining elements shaky at best.

Problem 2: The arbitrary cutoffs in ranges

When reviewing the second dictionary definition of a generation, note that it indicates a generation is "roughly 30 years." Whoa, say what? Let's look at the most common ranges observed for five current generations: Silent/Greatest (17 years), Boomers (18 years), Gen Xers (15 years) and Millennials (18 years). Ever wonder why Generation X was cut to be such a small range? Maybe some marketing nut had a grudge against this age segment at the time and wanted to diminish their perceived value by shrinking its population. Maybe a Millennial wanted to give their generation more attention (these are clearly stereotype-derived generational cheap shots) or maybe a Boomer parent of a Millennial wanted to give their kids more attention by diminishing one segment and expanding their kids' defined population segment.

The point is, it doesn't matter. The defined ranges are ultimately arbitrary at best. It's safe to assume 30 years seemed too sweeping for marketers so, they thought, let's shrink them. But for some reason, not to a precise range of years. These arbitrary ranges render things even more meaningless.

Why are they like this? No one truly knows. The drawing of arbitrary lines was driven by the second and third dictionary definitions and not the first. As a result, the end of WW II and the Kennedy assassination (or the advent of The Pill as some have suggested) were original driving forces in defining range cutoffs. When you look at the remaining cutoffs for Gen Xers, Millennials and Gen Z, we're left to wonder: Why these specific years? It's not quite as clear what historical events should dictate the most recent cutoffs. As a result, it's safe to assume this is why the definitions of Xers, Millennials and Gen Z remain squishy. It's possible that what defines a truly shared event during these years started dwindling. After the clearly shared event of the Kennedy assassination, one wonders why events like the moon landing, the Berlin Wall falling, 9/11 or an endless list of other historical events didn't create new cutoffs.

Getting back to the first dictionary definition

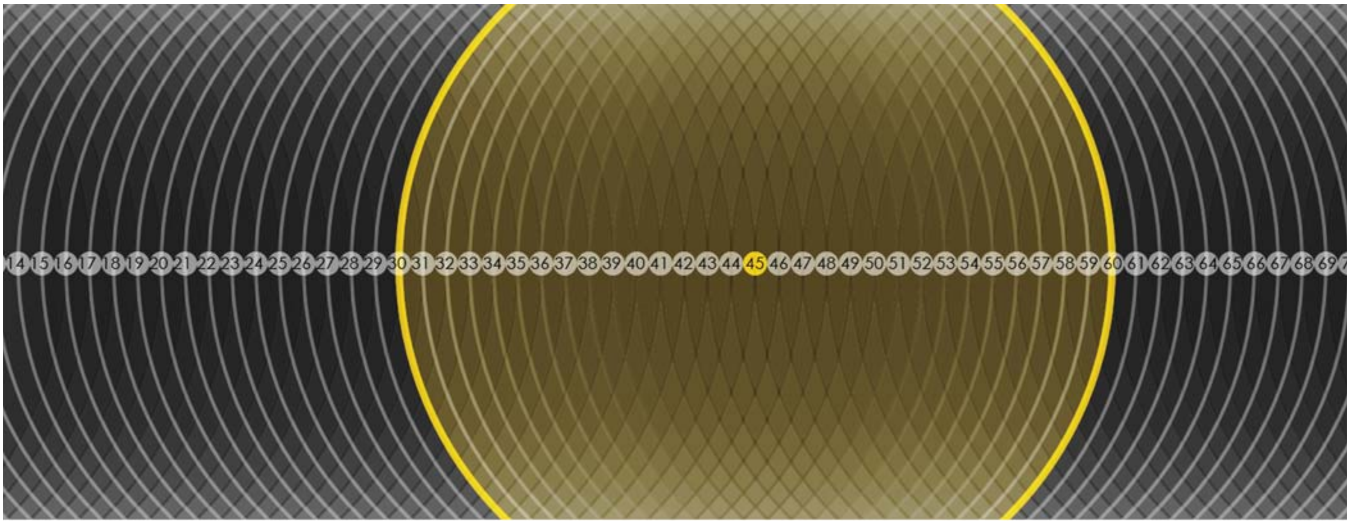

Figure 1: Generational Interpretation of a 45-Year-Old Along the Age Spectrum

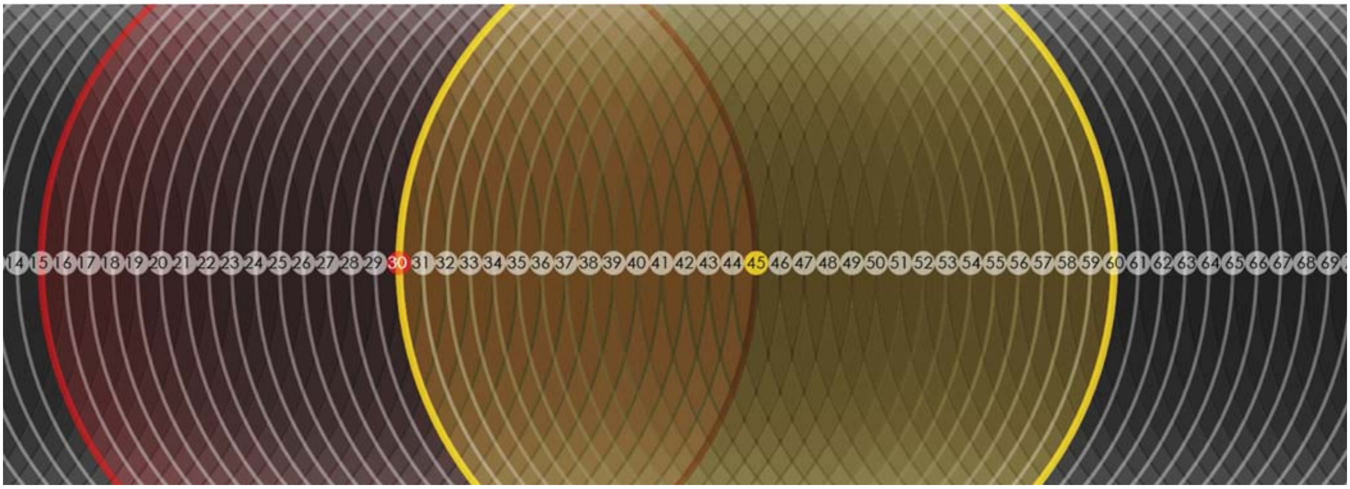

Figure 2: Generational Interpretation of a 30-Year-Old and a 45-Year-Old Along The Age Spectrum

(individuals born at the same time), it means that my view of a generation is different from every other individual's view. The reality is that generational definitions look like a Venn diagram gone crazy (see Figure 1).

The lines are blurred, by 300 million+ in the U.S. alone. There technically shouldn't be any cutoff dates. John, born of December 31, 1979, and his wife Jane, born on January 1, 1980, don't see themselves as different generations. This much is obvious, right? Even better, like a colleague of mine once said, "This generational stuff is BS. How is it that I'm in the same generation as my twin sons, born 17 years later? What a crock."

More simply put, if each of us has a 15-year generational definition on the older and younger sides of the spectrum, that means we each have our own defined generation and share millions of generational inclusions with other people's definitions – although I would argue the conscious generational radius starts incredibly small from birth and grows throughout one's lifespan. I'll reserve diving deeper into this concept for another article.

See Figure 2 for an example of personally defined generations through the lens of a 30-year-old and a 45-year-old. Note the significant overlap in shared generations between two individuals that could be traditionally defined as being in separate generations.

Ultimately, generational definitions are personally defined, not arbitrarily assigned by any governing organization, institution, marketing firm, ad agency, polling group or marketing guru.

Problem 3: The mathematical issue with ranges and aging

Because the first two problems weren't enough, I can mathematically demonstrate the problems with generational definitions by looking through the lens of age. Not a lot of thought was given to the idea of ranges in the marketing sphere, whether it be anywhere from 15 to 30 years, because if the ranges look nearly equal then one tends to think things are comparatively similar. One problem is your current age defines the size and scope of your shared experiences at any given point in time. For example, it's safe to say a 70-year-old and a 78-year-old could talk about similar experiences in their lives and would consider on another as peers. Can we say the same of a 5-year-old and a 13-year-old? They're separated by the same eight-year span. I think we can all agree that a 5-year-old and a 13-year-old will not consider one another as peers that can relate to similar experiences.

The great thing about comparative analysis is we can set equivalents for different age ranges. For example, the 78-year-old is 11.43% older than the 70-year-old and the 13-year-old is 160% older than the 5-year-old. If we want

Generation	2020 Age		Difference Between Oldest and Youngest	
	Youngest	Oldest	Years	Percent
Silent	75	92	17	22.7%
Boomers	56	74	18	32.1%
Gen X	40	55	15	37.5%
Millennials	21	39	18	85.7%
Gen Z	5	20	15	300.0%

a realistic age comparison with the 5-year-old in a relation that's similar to the 70- and 78-year-old, we can conclude that a child who's five years and seven months old is the peer equivalent (the older of each set being 11.43% older than the other). Likewise, a 13-year-old and a child who's 11 years and eight months old would be equivalent to the 78- and 70-year-old. These examples seem more realistic in peer definition ranges versus the years separating them. You can see how this mathematical realization is evident when using one of the traditionally defined ranges of the different generations with the current year's age at the bottom and top of each range (see chart).

When you look at the full range of ages from 1 to 100, you can see, yes, each is separated by one year but the percent difference in age more accurately represents the difference in relatability between humans spanning the entire spectrum. A 2-year-old is 100% older than a 1-year-old and there are clear differences in their human behavioral needs and capabilities; whereas there's only a 1.01% difference between a 100-year-old and 99-year-old. I think most of us would agree that their differences in human behavioral needs or capability differences are minimal.

This model indicates that the older we get, the wider range of ages we can relate to. The percentage gap shrinks or the rate at which we age slows down. I know, it's a bit of a mind-blowing concept but it explains why my 6-year-old daughter thinks a two-hour movie is forever and my 75-year-old mom can't believe how fast the last year went by. Time is in context of the life you've lived to that point.

Age presents differences along the social, physical and cognitive development spectrums as well. The younger you are the more changes you go through. Under one of the current definitions of Millennials they are between the ages of 18 and 34. An 18-year-old "young adult" is only two years removed from earning a driver's license and preparing to graduate from high school, while a 34-year-old adult could be on his/her third career change, married or divorced and have a second child on the way. Please stop with these groupings. Do these sound like two adults that can relate to each other?

Empirically, the mathematics of aging itself present the strongest case against designating generations based on arbitrary birth-year ranges.

Problem 4: Our instinctual preference for simplicity over complexity

Given the flimsy nature of arbitrarily defined segments and the obvious issues they present, we have to ask ourselves why there's such an obsession with them in marketing. The business world is full of flavor-of-the-month strategies and buzzwords. Why has this one hung around for so long?

Here's my hypothesis:

The power of branding is unfortunately stronger than we would like to believe. Simple phrases and concepts grab hold of us like parasites and are nearly impossible to notice, let alone shed. Give it a label and it will hang around our necks like an albatross. Humans gravitate toward concepts that are easy to remember and concepts that can be easily shared.

When you strip away the branding element of "generational targeting," what do we have? It's simply "age-range targeting." When you call it what it is, the veneer starts to dull rather quickly. Worse, this "strategic, targeted" approach only allows you to use five different age ranges – one on the way out (the Silent generation) the other still emerging (Gen Z) so, really there's only three. It's safe to say this is anything but targeted.

These limited segments sure sound simple and are easy to wrap my head around, whereas, having hundreds, if not thousands, of different behavioral or usage-based targets sounds daunting. Who can blame a stressed-out marketer for wanting a simpler way? But the strategic reality is, if this conventional "generational targeting" is your approach, you're barely walking upright on the evolutionary chart of marketing.

Over time, contributors from the media, marketing and advertising industries came up with these arbitrary generational labels, successfully funneling a lot of attention and money their way. The realities are that marketing has become increasingly more complex and business decision-makers are still searching for simple constructs that hearken back to decades-old, sweeping approaches to targeting. Voila! The birth of Millennials and generational targeting.

The advent of technology and a digital society hasn't only impacted the youngest of our society, it's helped erode what flimsy walls may have already existed between varying age segments. Now, a 55-year-old Marvel comic book fan can share the same experiences as a 15-year-old one, buy the same stuff, attend the same Comic-Con events and share common ground. (Insert sounds of traditional and stereotypical age-devised walls collapsing here.)

Don't forget: Our desire for simple and catchy marketing solutions has clouded our judgment and decisions in employing and executing effective marketing strategies.

Problem 5: The ways humans relate goes way beyond age

Lastly, the complexities of geographic, family, social, economic, racial, cultural, values and a myriad of other circumstances can have further implications on shared life experiences. I'm only two years older than my wife (who can be labeled Millennial or Xer depending on which definition you use) and I, a traditionally categorized Xer, periodically reference childhood memories of MTV music videos and various TV shows. She regularly reminds me that she has no idea what I'm talking about. You'd think I was talking to someone 15 years older than me. She grew up in a small southwestern Virginia town and had no cable television. Maybe only two or three local broadcast stations were all that really came in on their television.

All these factors come into play on shared experiences but are not accounted for when creating generational or age-range targeting segments.

Trendy marketing concept wildfire

The truth is, at one point I considered writing a book called "Micro-Generations; the Targeted Approach that Will Forever Change Marketing." In the first half of this book I would outline the clear issues with generational targeting as it's defined now (similarly to this article but with greater detail, research and charts to validate the premise even further). In the second half, I would offer newly minted generations defined by individual years. I would outline stereotype-derived descriptions for each of the 100 different and newly defined generations, with the best proof of concept being each reader's response to their own. That moment where the reader thinks, "This describes my micro-generation to a T," would help to validate the concept and springboard it into trendy marketing concept wildfire. "You've got to read this book!" people would say in every marketing meeting for the next 18 months. It would reach multiple top business book bestseller lists. I would get invites to talk shows and podcasts. I'd introduce tests for identifying which micro-generation you are most likely to resemble based on attitudes and behaviors other than your predetermined age. I'd have a business training seminar machine making loads of money. I'd develop the concept for different countries, making it an international hit. My house, kids' educations and retirement would all be paid for.

And I'd be a fraud – no different than the frauds peddling the current generational targeting approach.

I'd be preying on the business leaders around the world obsessed with generational targeting, seemingly unaware of the inherent confirmation biases it presents and how it's nonsensically guiding their marketing decisions.

Know your customers

So, what's a generational marketer to do given the underwhelming evidence of this approach's value? Get to know your customers. Get to know how your customers differ from your industry's customers. Get to know how your customers and your industry's customers differ from the markets you serve. And I don't mean get to know them simply by age or traditional demographic breakdowns. Learn about their lives, their activities, their interests, their spending habits, technology behaviors and more. These details will immeasurably impact the way you go to market and target the greatest opportunities.

If I've been able to kick your generational-targeted marketing crutch in the least bit, let me be the first to welcome you to the only generation that truly exists, where sweeping stereotypes no longer apply: It's called Your Generation.

Now go, spread the word about how we're being fooled and help others wean themselves off this wretched fixation. It's time to bury this way of thinking for good and start employing more evolved approaches. Best of luck!

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••• qualitative research

Stop making sense

How counterintuitive thinking can inject some fresh perspectives into your research

| By Susan Fader

snapshot

Susan Fader explains how the use of unexpected approaches to research may be just what you need to overcome strategic challenges.

www.quirks.com/articles/2020/20200715.aspx

A car stuck in the mud – wheels spinning, going nowhere – is how many of us have felt at some point when confronted with a business challenge. We are stuck because we don't know how to reframe the situation to get us moving forward. In many market research challenges, where a round of research has not uncovered the needed insights, we revert to the often-quoted definition of insanity: doing the same thing over and over again and expecting a different result. While the techniques or research provider may change in the subsequent rounds, in most cases the same baseline assumptions are kept.

But what if these baseline assumptions are wrong? You may stay stuck in the mud, spinning your wheels. If you're looking to generate new perspectives, try some counterintuitive thinking.

Counterintuitive thinking and behavioral economics share some common roots. Behavioral economics work has shown that people make irrational decisions and/or behave the opposite of what you might think. Counterintuitive thinking is about injecting some of that irrationality, something that might not appear logical, into your research design. Counterintuitive thinking can reframe the strategic challenge and enable you to think differently so you have an approach that leads to more meaningful results.

Before discussing specific marketing research counterintuitive thinking approaches, let me share examples of how counterintuitive thinking can impact marketing and positioning decisions.

Is five out of five stars the best rating? While for some things like your vacation hotel you may want a rating of 5/5 stars, for many consumer products the sweet spot is actually a 4.2-4.5 stars. A study by Northwestern University's Spiegel Research Center that used 22 product categories encompassing over 100,000 SKUs across multiple e-commerce platforms found that most consumers feel that perfect user reviews are too good to be true. About 80% of consumers in these

product categories actually search out negative reviews because the negative reviews are seen as a reassurance tool, helping to establish trust in the other ratings and boost their authenticity. In many cases, the negative feedback is not even relevant to them, e.g., "didn't like the color blue" or "took three days to arrive."

Are your most reliable customers your best customers? Are they the ones who are going to generate the most income? Credit card users who pay their bills in full each month may feel it is counterintuitive for credit card companies to send preapproved card applications to people who just declared bankruptcy and don't have money to pay their bills. That doesn't seem to make sense! But they don't generally have money to pay for things now, so they have to charge purchases and when the bill comes, they can't pay in full so they do partial payments and thus pay growing amounts of interest.

Without context, are you solving the problem? You have to make sure you identify the right problem and frame it within the right context. Instant cake mixes were developed to solve what was perceived to be housewives' (yes, this was in ancient historical times, when the main target was housewives) complaints about not having the time to whip up a cake from scratch. When the mixes were first put on the market you just needed to add water to the contents. Sales were terrible. But they skyrocketed when the mixes were reformulated with the new requirements of adding an egg and oil in addition to the water. Why did that make such a difference and wasn't it counterintuitive to what the women were saying? Well, what frustrated women about baking from scratch was the time it took and the mess it made. They loved creating something homemade rather than store-bought and the near-effortless version of the cake mixes took that satisfaction away. Eggs and oil were things that almost every housewife always had in their larders and adding the steps of cracking an egg and measuring out some oil allowed the women to feel like they contributed more to the process and that the resulting cake was truly homemade.

Counterintuitive thinking – use an outsider approach in design

When designing a research project, experience obviously matters but if there's a project where you are stuck or want to generate some innovative ideas, the Einstellung Effect says it might be useful to bring in someone who's unfamiliar with your situation. The Einstellung Effect refers to a person's predisposition to solve a problem in a specific manner, even though better or more appropriate methods exist. David Epstein, in his book "Range: Why Generalists Triumph in a Specialized World," uses trench-digging to illustrate this: "Everyone is digging deeper into their own trench and rarely standing up to look in the next trench over, even though the solution to their problem happens to reside there."

A specialist may dig a deep trench and only employ methods they're familiar with and construct hypotheses within the confines of their specific expertise and POV. A generalist – the outsider – may have a wide breadth of knowledge and experience, allowing them to pull from many different sources to find solutions in experiences across a broader range of options.

The outsider approach can be integrated in three ways into market research.

Complete outsider. For a study on meat, for example, consider having a vegan design it. Because a vegan has no personal experience eating meat, they will bring different perspectives and questions than a meat-eater. The vegan will also probe differently. In conversations, the research participants, who are aware that the moderator has never eaten a hamburger, will tend to explain things in detail that they might just assume a meat-eater would know. Better yet, divide the moderation between a vegan and meat-eater and you will get even more insights.

Kind of an outsider. Sometimes when you do research you have to break through the defensive barriers of the people you are talking to. In a study with white evangelical Christians that I worked on, the objective was to identify ways that they might, at a minimum, not be against passing state laws making it illegal to discriminate against LGBTQ people in the area of housing and jobs. (At the time it was legal in more than 30 states to evict someone from a rental and fire them from their job if they were gay.) When talking about beliefs and ways to rationalize a point of view, it is not unusual for the conversation with white evangelical Christians to begin with sourcing and quoting the Bible as a first line of defense. I am not an evangelical Christian but I did grow up in a religious home and I know my Bible. So after a bit of back and forth where I established that I respected religion and I knew my Bible, we were able to get down to having honest, open discussions because while what we were talking about was to them a very controversial issue, they knew I shared common foundational knowledge and experiences and so was not judging them or trying to make them look bad.

Obvious outsider. For another project, I was called in at the last minute to take over the moderation of in-person focus groups with African American women to identify new product ideas for their haircare needs. I'm not African American and while I had prior experiences in haircare and beauty products, they were more geared toward white consumers. As part of the introduction the women were told to bring in all the haircare products they used and do a show-and-tell. Being the white lady in the room, who had never seen many of these products before or even known of their existence, the women took pity on me and went into extensive detail about each of them, how they used them and what they would do to make them better. The client was thrilled. Because the women assumed I knew nothing, they felt they couldn't imply anything and the detail they provided identified many new product opportunities. When the women had done the show-and-tell for the insider – the African American moderator – they had not gone into detail because the show-and-tell had just been meant to be a quick icebreaker and it was obvious to all what the products were and why they were used so there was no need for the details to be explained.

Counterintuitive thinking – unconventional purchase demographics

Counterintuitive thinking says that there are times you need to step away from focusing on your traditional demographics. Consider:

People who no longer need your product or service. I did a study for a well-known jewelry company on engagement rings. Who did I talk to? Nope – I didn't talk to people who were getting married and had bought engagement rings. I spoke to people who had broken their engagements and now had rings they no longer needed and could not return. People who are getting married are generally in la-la land and are in a very different frame of mind and emotional state from those who are raw and hurt from a broken engagement. The broken-engagement people were much more introspective and honest about sharing positives and negatives about their engagement in general and their engagement ring shopping experience.

People who are angry. Bill Gates nailed it when he said, "Your most unhappy customers are your greatest source of learning." Your angry customers are upset because of something you did or didn't do but they still need your products or services. Generally, the rule is to not recruit people who are overly negative or angry and if one makes their way into research, you let them vent for a couple of moments and then move on. With counterintuitive thinking you are deliberately recruiting people who are angry at you. WARNING: This type of study should only be undertaken by a highly experienced moderator who can handle a very opinionated and verbose crowd. Not an easy task.

Competitor loyalists. Here, the focus is on your competition, not you. When doing research with competitor loyalists, counterintuitive thinking emphasizes that you resist the urge to get them to talk about you. When setting this up and when observing this research, be in the frame of mind that you are the competition and you are listening to what your customers (who are really competitive customers) are saying about their relationship with your competitor (but you are listening as if you are the competition). It's fine if they start talking about you organically but know that they may not. Focus instead on the opportunities that listening to these loyalists can offer you.

Counterintuitive thinking – narrative economics, storytelling as input

Counterintuitive thinking is about focusing on stories as input, not as output. Robert J. Shiller, the 2013 Nobel Prize Winner in Economics and the father of narrative economics, believes that stories should be used as input not as output. Most market researchers focus on using stories as output, as part of the deliverable function of distilling and sharing what was learned during the research process. If research participants are asked to share stories, a primary gauge of the story's value is whether it can be featured in the reporting to help sell a message. The focus is on creating or selecting stories from research based on what will best convey the research insights and many of those stories are consciously curated to convey specific messages.

Counterintuitive thinking says to focus on stories as input and recognize that stories can be many things. As Shiller says, a story "may be a song, joke, theory, explanation or plan that has emotional resonance and that can easily be conveyed in casual conversation…Narrative is a story or representation used to give an explanatory or justification account of a society."

Also, very importantly, I believe that narrative economics puts a different spin on how behavioral economics should be viewed. Classical economics says that people make rational decisions; behavioral economics says that people make irrational decisions. Narrative economics says people can be making decisions that are rational to them but appear to be irrational to the outsider. Therefore I believe that behavioral economics should be viewed as the outsider's – the market researcher's – perspective/judgement on whether the person being studied is making a rational choice or decision. Narrative economics should be viewed as the insider's – the person being studied – perspective of why the choice or decision may be rational to them.

Counterintuitive thinking – backstories – it's not about what you know, it's about what they think

When designing and fielding research one of the things we always wrestle with is too much stuff to fit into a limited amount of time. It's not unusual to hear, "Hey, we already know that. We don't need to ask that again." So it would seem counterintuitive to spend precious time on letting research participants share information that you already have reams and reams of data on.

But hey, counterintuitive thinking is about resetting baseline assumptions. It's not about what you know, it's about what the people you are talking with want to share information about. Backstories provide context by allowing people we want to hear from to frame the narrative and decide the context.

For example, I did a study with heavy users of fabric softener. The client wanted to jump right in and ask them questions about fabric softener. I pushed back. I wanted the research participants to do some self-diagnostic ethnography at home – to self-observe their laundry habits and then share three things they like and three things they didn't like about laundry as part of the introduction. We had them do that in a three-dimensional collage. (See my Quirk's article on 3D collages for more details: https://bit.ly/2XQD5Lm) Guess what? A number of these hardcore fabric softener users did not even mention fabric softener in their stories. A tremendous insight, one we would have missed had we not moved our baseline assumption starting point.

Counterintuitive thinking – more than collecting data

Just as the previous fabric softener example showed, pre-work/homework should be designed as a self-diagnostic ethnography tool that helps the research participants get insight into their own behavior and helps them formulate ideas and perspectives about things that may generally be subconscious/automatic behavior. Having research participants self-report in the form of stories identifies how they see and interact with the world. The words they use, where they start their stories and what they leave out are so important.

Inject some fun

So, reexamine your baseline assumptions, inject some fun and integrate counterintuitive thinking when you want to get out of that rut and move forward with your research insights. Sometimes the best path to take is the least obvious one.

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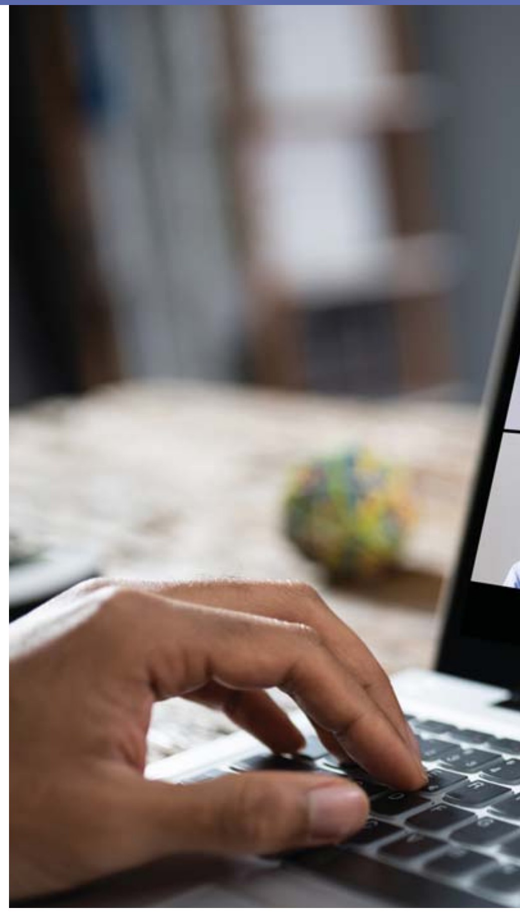
special advertising section

20 TOP ONLINE INSIGHTS PLATFORM COMPANIES



With many businesses and consumers alike continuing to follow social distancing guidelines, more and more brands are opting for online research methods to gather insights and reach consumers. Online insight platforms enable companies to reach a wide variety of consumers quickly and accurately, and with so many people shifting shopping behavior due to altered business guidelines, online research has become a valuable way to study this new consumer.

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www.2020research.com

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Michael Bylinkin and Michael Sack, Co-Founders

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Phone 1-513-712-0604
www.brandkinetics.net/consumer-insights

C&C Market Research

Founded 1992 | 500 employees
Thomas Morrison, Project Director

C&C Market Research is the complete answer to all of your data collection needs. For over 25 years our data collection specialists and field locations, coupled with our proprietary programming and data transmission capabilities; have ensured countless successful projects for all our clients. We are the largest privately owned and operated data collection company in the U.S. and have remained a leader in today's marketplace through hard work, ingenuity and a dedication to quality. We understand the need to adapt and our online data collection capabilities have allowed us to continue successfully collecting the data needed to complete projects during these trying times. Each of our 38 facilities across the U.S. have localized databases that have been created through our F2F data collection over the years and can now be utilized for multiple types of online projects. Please call or e-mail us at bids@ccmar.com and we can help with your next project!

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Civicom Marketing Research Services

Founded 2000 l 500+ employees
Rebecca West, Global President, Marketing Research Services Group

Civicom Marketing Research Services is leveraging its strength to offer an effective alternative solution to insights industry professionals without the risk of in-person meetings or travel. Civicom's CyberFacility® solution enables you to conduct your research remotely, with moderators, clients and respondents all joining the interview or focus group from their own individual locations. CyberFacility® can help you protect the integrity of your online research as you transition to remote tools due to the health crisis. You no longer need to postpone or cancel any projects, keeping with our motto, "Your Project Success is Our Number One Priority." Contact us at inquire@CivicomMRS.com.

Phone 1-203-413-2423
www.CivicomMRS.com

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Founded 1996
Kyle Ferguson, CEO

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www.confirmit.com

Decision Analyst Inc.

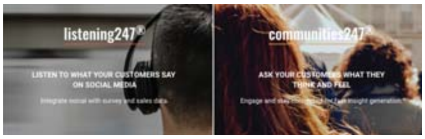
Founded 1978 | 150 employees
Jerry W. Thomas, CEO

Decision Analyst started building its online research capabilities and systems in 1996. Since then, we have become a global leader in digital research systems by developing secure, scientifically valid, advanced software and systems. Decision Analyst offers both quantitative and qualitative online research, including traditional online surveys, large scale qualitative, virtual ethnographies, website or app usability, mobile surveys, video diaries and in-vehicle video. Decision Analyst's researchers can recommend the qualitative or quantitative technique best suited to your research needs. Decision Analyst has over four decades of experience in marketing research and consulting and delivers highly analytical and decision-oriented insights.

Phone 1-817-640-6166
www.decisionanalyst.com/online

DigitalMR Ltd.

Founded 2010 | 15 employees
Sophia Papagregoriou



DigitalMR is a tech company with proprietary platforms for high accuracy social intelligence, listening247, and DIY private online communities, communities247. Specializing in the use of AI for insights and the integration of social, survey and sales data, DigitalMR's main areas of research include automated text and image analytics, particularly high accuracy sentiment, semantic (topics) and emotions analysis in any language, as well as image theme captioning and logo detection. DigitalMR's platforms were developed by researchers for researchers through years of focused research and development and can provide market research agency users with a distinct advantage over their competitors.

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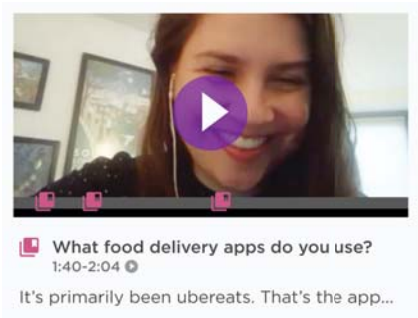
Simon Glass, CEO



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DISQO

Founded 2015 | 130+ employees
Armen Adjemian, CEO

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Phone 1-818-287-7633
www.DISQO.com

Explorer Research

Founded 2004 | 50 Employees
Marc Inkol, President

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Phone 1-855-251-5434
explorerresearch.com

GutCheck

Founded 2010 | 100 employees
Matt Warta, CEO

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Founded 2004
Shamsu Bhaidani, CEO

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www.hatchnewideas.com

InnovateMR

Founded 2014 | 110 employees
Lisa Wilding-Brown, Chief Research Officer

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KL Communications

Founded 1996
Kevin Lonnie, President and CEO

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www.klcommunications.com

Maru

Founded 2016 | 300 employees
Ged Parton, CEO

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Plaza Research

Founded 1982 | 150 employees
Laura Kibala, VP of Operations

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CALENDAR OF EVENTS

••• can't-miss activities

The Quirk's Event Virtual will be held on **July 14-16**. Attend virtual sessions through live presentations and pre-recorded video broadcasts from a range of companies including CNH Industrial, SAP, Constellation Brands, eMoney Advisor, Voya Financial, Molson Coors, PBS, Mars Wrigley, Clear M&C Saatchi and many more. Take a break from scheduled sessions to participate in video happy hours, browse exhibitors' offerings and take fun classes – such as yoga, sewing and cooking. Visit thequirksevent.com.

IQPC will hold its Customer Contact Week event on **August 24-28** in **Las Vegas**. Visit bit.ly/37LuwGw.

The Merlien Institute will hold its Qual360 APAC event on **September 1-2** in **Singapore**. Visit apac.qual360.com.

Digital Food & Beverage 2020 will be held on **September 24-25** at the Hyatt Regency in **Austin, Texas**. Visit foodandbeverage.wbresearch.com.

The **Merlien Institute** will hold its virtual MRMW NA event on **September 30 - October 1**. Visit na.mrmw.net.

Worldwide Business Research will hold its eTail Boston 2020 event on **October 13-15** at The Sheraton in **Boston**. Visit bit.ly/2YHLAco.

The Bay Area Pharma Market Research Conference will be held on **October 14-15** in **San Francisco, Calif**. Visit bay-area.pharmamarketresearchconference.com.

Empresarial will hold its 2020 Printemps Des Etudes (Spring Studies) Trade Show on **October 22-23** at Palais Brongniart in **Paris**. Visit printemps-etudes.com.

ESOMAR will hold its APAC Event on **November 1-3** in **New Delhi**. Visit bit.ly/2YEt8RO.

The European Pharma Market Research Conference will be held on **November 3-4** in **Opfikon, Switzerland**. Visit europe.pharmamarketresearchconference.com.

The 2020 Pharma CI Europe Conference and Exhibition will be help on **November 5-6** in **Opfikon, Switzerland**. Visit europe.pharmaciconference.com.

The **Merlien Institute** will hold its MRMW APAC 2020 event on **November 17-18** in **Singapore**. Visit apac.mrmw.net.

The **Merlien Institute** will hold its MRMW EU event on **December 1-2** in **Amsterdam**. Visit eu.mrmw.net.

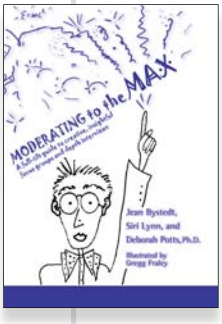
The Pharma Market Research Conference USA will be held on **February 3-4** in **Newark, N.J.** Visit usa.pharmamarketresearchconference.com.

Event details as of June 17, 2020. Please see websites for more details.

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


NEWS

ESSENTIAL READING FOR RESEARCH PROFESSIONALS

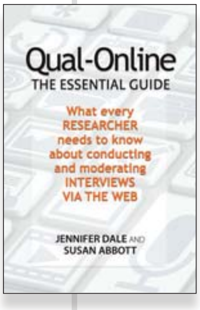


Moderating to the Max

A Full-Tilt Guide to Creative, Insightful Focus Groups and Depth Interviews

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

160 pages, 7x10, 978-0-9830436-2-1 $34.95 paper

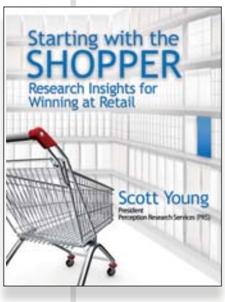


Qual-Online: The Essential Guide

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

From the types of tools at your disposal to planning your first online study, this extensive guide will help you understand the sequence of steps to follow, timing, and costs involved and help you manage all of the useful insights you will gather—making your job of sharing information with your client that much easier and your reports more robust. *The* must-have guidebook.

216 pages, 6x9, 978-1-941688-26-7 $29.95 paper

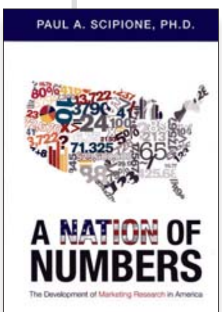


Starting with the Shopper

Research Insights for Winning at Retail

Actionable insights, case studies and "lessons learned" from thousands of studies conducted by Perception Research Services, a global leader in packaging and shopper marketing research. What works in store, in home and online, and how best to apply shopper research to drive and measure success.

136 pages, 7x 9, full color; 978-1-941688-23-6 $39.95 paper

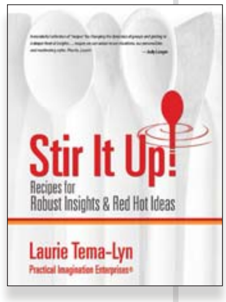


A Nation of Numbers

The Development of Marketing Research in America

Paul Scipione identifies the factors and events that came together to make America the birthplace of marketing research and documents how far the marketing research industry has come in its first 100 years, morphed from analog to digital, with new tools in big data and advanced analytics, observation of actual consumer behavior via scanning UPC codes, and advances in the neurosciences, and speculates where the industry will be in the future.

546 pages, 7x10, 978-0-9852482-2-2 $49.95 cloth

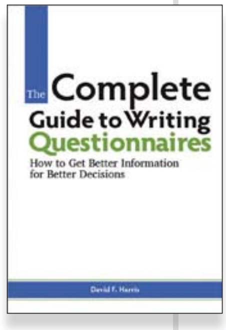


Stir It Up!

Recipes for Robust Insights & Red Hot Ideas

From time to time, every moderator, meeting chairman, or in-depth interviewer needs fresh ideas to jazz up a tired group or reenergize a flagging meeting. Here are 50 fresh ideas for exercises in an easy-to-use cookbook format. Organized by category, from Ice Breakers to Idea Developers each "recipe" (exercise) is presented with a brief description, an estimation of time required, a list of materials needed, instructions for how to do it, and useful tips.

140 pages, 7x9, 978-0-9830436-3-8 $24.95 paper

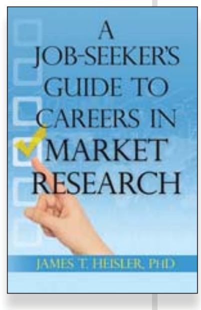


The Complete Guide to Writing Questionnaires

How to Get Better Information for Better Decisions

A comprehensive framework for creating questionnaires from planning research to support decision-making, conducting qualitative research, and planning the questionnaire before you begin writing questions, with guidelines to make questions clear, answerable, easy, and unbiased for the three most common tasks researchers ask respondents, and how to properly pretest a questionnaire.

220 pages, 7x10, 978-0615917672 $54.00 paper



A Job-Seeker's Guide to Careers in Market Research

How to Decide if a Career in Market Research is Right for You

An authoritative guide to the market research industry at the beginning of the 21st century, its size and scope, what value it provides, who works in the field, who uses it and for what decisions, the market research process, common methodologies, growth prospects for the industry, and more. The book explores market research as a career choice—skills, education, and training; how to get that first job, moving upward, potential earning power, success profiles, and stepping stones to related careers.

174 pages, 6x9, 978-1-941688-31-1 $34.95 paper

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Quirk's Marketing Research Review, (ISSN 08937451) is published bi-monthly - Jan/Feb, Mar/Apr, May/Jun, Jul/Aug, Sep/Oct, Nov/Dec - by Quirk Enterprises Inc., 4662 Slater Road, Eagan, MN 55122. Mailing address: P.O. Box 22268, St. Paul, MN 55122. Tel.: 651-379-6200; Fax: 651-379-6205; E-mail: info@quirks.com. Web address: www.quirks.com. Periodicals postage paid at St. Paul, MN and additional mailing offices..

Subscription Information: U.S. annual rate (12 issues) $70; Canada and Mexico rate $120 (U.S. funds); international rate $120 (U.S. funds). U.S. single-copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change.

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10 minutes with...

Tanya Pinto
Director, Market Research, Microsoft

"The focus that Microsoft has on diversity, inclusion, environment and philanthropy is world-class in terms of corporate values and corporate social responsibility."

You've been with Microsoft since 2017. What has been the most rewarding aspect of your job?

Microsoft and our CEO, Satya Nadella, represent so many great values and inspiring principles that I admire. The focus that Microsoft has on diversity, inclusion, environment and philanthropy is world-class in terms of corporate values and corporate social responsibility, and one of the key reasons I joined Microsoft.

Since joining the Customer and Market Research organization at Microsoft I have been given so many opportunities for growth and learning. My research work supporting the Worldwide Education Marketing team has been the most rewarding because I have been able to explore and delve into the needs, motivations and pain points that those working in K-12 and higher education face around the world when it comes to technology. Now more than ever, the need for technology to keep students connected to learning opportunities is critical. Conducting research to support education has been extremely rewarding, especially when these learnings can really help educators during this crisis.

You presented a session at Quirk's Brooklyn, Decoding Signal vs. Noise. Could you share a few highlights from the session?

This was my first time both attending and presenting at Quirk's in Brooklyn and it was an amazing experience. The session I co-presented with Marc Goulet, partner at Russell Research, was really well attended with a great mix of corporate and agency researchers. Developing an intentional and systematic work stream to uncover trends that are coming around the corner – vs. looking backwards, hindsight – was something that seemed to pique the interest of the attendees. Many of the questions and feedback I got after the session concerned the processes, funding and work streams that enabled those insights, particularly for corporate research departments that are really stretched for time and resources.

Outside of marketing research, you have been running a nonprofit, Baal Dan Charities and Food Mission, since 2005. What inspired you to enter the nonprofit space?

I started my own nonprofit after taking a life-changing sabbatical to work at Mother Teresa's orphanage and home for the dying in Kolkata, India. My grandfather was an orphan so growing up I had always had a dream to help children in need in some way. The hands-on experience I gained working in the orphanage and witnessing extreme poverty motivated me to do something to help children in need so I started Baal Dan Charities, which means "donation to children" in Hindi, with the mission of providing grants for essential food, supplies, education and health care to children in need. To learn more, visit www.baaldan.com.

Read the full interview at www.quirks.com/articles/2020/20200722.aspx.