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For marketing research and insights professionals

ACUTE OR CHRONIC?

Survey assesses the longevity and impact of COVID-19-related changes to physicians' practices

PLUS

12 rules for better marketing research

Using consumer input to drive brand responses to social change

Doctors and patients talk about telehealth

ADVERTISING SECTIONS

22 Top Panel Research Companies

16 Top Telephone Research Companies

Quirk's Marketing Research Review
January/February 2021
Volume XXXV Number 1
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Matt (Client Solutions):
“Sue, I would like to remind our clients that we also do awesome quant work.”

Sue (Marketing):
“Okay, Matt.”

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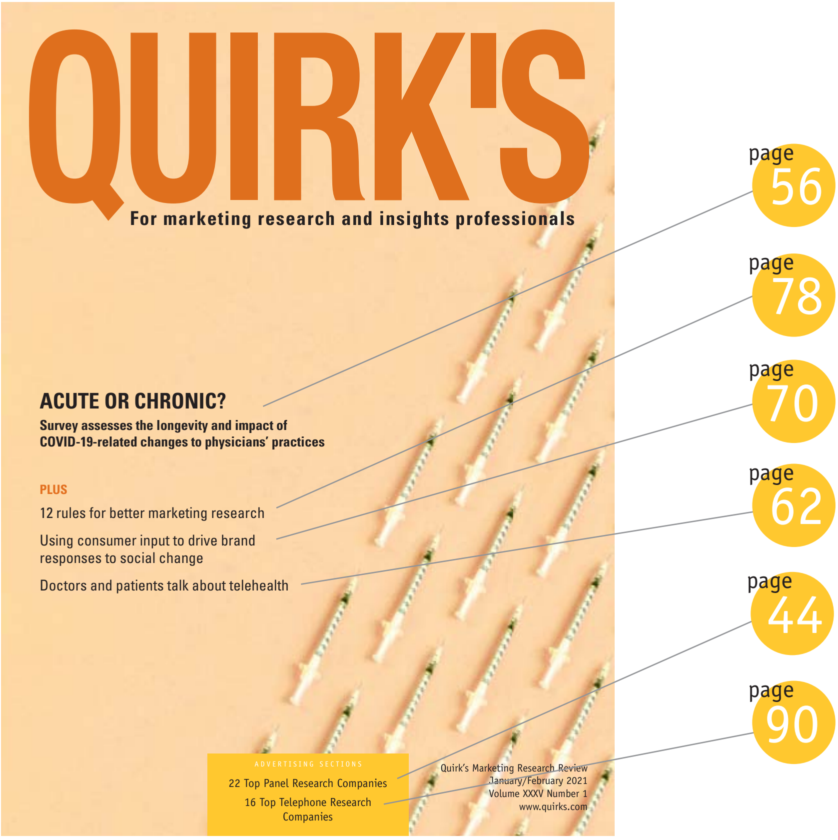
CONTENTS

Quirk's Marketing Research Review
January/February 2021 • Vol. XXXV No. 1



DEPARTMENTS

ON THE COVER

FEATURES

COLUMNS

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••• webinars

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Explore MR topics, sharpen your skills and stay current on industry trends with Quirk's Webinar Wednesdays! This new monthly mini-event is designed for marketing research and insights practitioners, industry leaders and anyone else who wants to join Quirk's online. Each Webinar Wednesday will include sessions on a variety of topics presented by Quirk's partners. During the webinars, attendees can easily ask questions and interact with speakers via the platform's live text-based chat feature.

To view the 2020 schedule and register, visit https://www.quirks.com/events?title=webinar.

If you're interested in partnering with Quirk's to produce a webinar, send an e-mail to info@quirks.com.

••• get published

Write for Quirk's in 2021!

At Quirk's we are always looking for interesting, objective articles on all aspects of marketing research and insights and we welcome articles from outside sources. Between our magazine, e-newsletter, Research Industry Voices blog and Careers blog, we have a variety of outlets for authors.

To submit an article for magazine consideration, contact Quirk's Editor Joseph Rydholm at joe@quirks.com. For e-newsletter or blog content, contact Quirk's Digital Content Editor Emily Koenig at emilyk@quirks.com. Submission guidelines can be found at www.quirks.com/pages/write-for-quirks.

// E-newsworthy

Advancing research in an ever-evolving technology industry
quirks.com/articles/2020/20201225-1.aspx

Tips for navigating sample feasibility challenges
quirks.com/articles/2020/20201225-3.aspx

Mindfulness: Conducting qual amid the COVID-19 pandemic
quirks.com/articles/2020/20201127-1.aspx

Quirk's Blog

Top industry adopters of recommended COVID-19 precautions
https://bit.ly/33V618Q

COVID-19: Survey Monitor: Part 10
https://bit.ly/3qHdySz

Research Industry Voices

User experience: 4 touchpoints for better insights
https://bit.ly/3n3zkh0

Crafting data-driven stories that yield actionable recommendations
https://bit.ly/33XgAIS

The future of TikTok
https://bit.ly/2K4QT1U

Shopper research options in a COVID-driven environment
https://bit.ly/2IvqIRm

Research Careers Blog

Leading growth: 7 "old-school" leadership qualities that curb success
https://bit.ly/3qDVg4G

The Great Reset: Researchers find solidarity, silver linings during virtual event
https://bit.ly/3gsSB9g

Engaging employees as brand ambassadors
https://bit.ly/37OycFC

In Case You Missed It

news and notes on marketing and research

••• shopper insights

Dress up and spend up?

Sharp-dressed shoppers put more items in their carts and spend more money than their casually dressed counterparts, according to research from Duke University's Fuqua School of Business. How much more? In one research experiment, shoppers in dressier clothing, such as a dress or blazer, bought nearly 18 percent more items than shoppers in casual outfits, such as t-shirts and flip-flops.

Well-dressed shoppers also spent about 6 percent more money than casually dressed shoppers, according to "The aesthetics we wear: how attire influences what we buy," a paper co-authored by Fuqua marketing professor Keisha Cutright and published in the Journal of the Association for Consumer Research.

This is because when you look sharp, you have more social confidence, and this reduces anxiety people have about making decisions, Cutright says. "We focus on how your dress affects your own perceptions. When you're dressed formally, you believe that other people are looking at you more favorably and they believe you are more competent. If you feel confident, you can buy whatever you want without worrying what other people think or whether they will be judging you negatively," she says.

The researchers also ran a study to test whether retailers can influence how people dress when coming to their stores and found ads with more formally dressed models prompted would-be customers to choose nicer outfits to go shopping in. "We saw that retailers could influence what people wore, and then, depending on what people wore, that affected the store's sales," Cutright says. "So there are some practical implications from this research for retailers."

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••• financial services

COVID cranks up Canadians' credit curiosity

COVID-19 has caused many Canadians to check their credit reports and scores more frequently according to a November 2020 survey conducted by Equifax Canada. Within the last 12 months, 71 percent of survey respondents have checked their credit report, including 57 percent in the last month. Younger adults (under age 55) and Quebecers were far more likely to have checked their credit reports on a regular basis. This is a significant shift for consumers when considering 67 percent of survey respondents rarely or never checked their credit reports, according to a similar survey conducted by Equifax in 2016.

In addition to checking their credit reports, survey respondents indicated they are obtaining their credit scores more frequently. More than half (54 percent) said they obtain their score at least annually, as compared to 48 percent a year ago. Younger adults (those aged 18-34) are significantly more likely to check their credit scores monthly versus those over the age of 35 (37 percent in 2020 vs. 27 percent in 2019).

By Joseph Rydholm, Quirk's Editor

Report proposes a reimagined travel industry

At press time in mid-December, many parts of the country are still under lockdowns that restrict nonessential travel. With the death toll showing no sign of slowing, it's hard to imagine jetting off to anywhere. But the first doses of a COVID-19 vaccine are due to be injected into frontline health care workers within days of this writing, an initial step in what will surely be a long road back to some kind of normalcy, and I got to wondering about how long it might be before we can begin hitting the road again.

My first thought was that we will likely have to carry some proof of vaccination to board a plane (or attend a sporting event, a movie or a conference), probably in an app on our phones. Indeed, airlines United, JetBlue and Lufthansa have announced plans to introduce CommonPass, a health passport app, and security company CLEAR already links LabCorp COVID test results to its Health Pass app.

The role of technology in reviving the travel industry is just one of the topics covered in Accelerating Travel Innovation After Coronavirus, a report by Caroline Bremner, Euromonitor International's head of travel research. (It's available as a free download from the white papers section of Euromonitor's web site. Registration is required.)

Much of the report focuses on the sustainable travel movement – which at the moment seems like an extravagance, seeing as how it's hard to travel, period, let alone travel sustainably, but as Bremner notes, the down-to-the-studs reimagining that the virus has wrought is an opportunity to rebuild and reshape travel as we know it. "Responding to the global SOS, travel brands and destinations went back to first principles and got creative," she writes. "Many came back fighting, showing great resilience, agility and strength in times of adversity. Innovation was a key vehicle for adapting to the new norms, accelerating digitalization and sustainability to future-proof recovery. The pandemic has sharply revealed the fault lines in the industry's business model, redrawing the global map as new priority corridors and alliances emerge post-lockdown. Unchained from the past, there is a chance to reset and correct the course of history, to chart a better path based on the universal values that unite us, rather than divide us. Putting aside differences and acting with purpose, the path to carbon neutrality, equality and social justice can be achieved by following the [United Nations 17 Sustainable Development Goals]. With technology as the enabler, it is time to harness nature, culture, adventure and shared experiences to build a travel industry fit for purpose."

It's a fast read and worth your time even if you're not in the travel industry for the wealth of examples of how some nimble companies have responded to the seismic shifts, from Aeroguest, a Danish app that "provides consumers a fully digital and touch-free hotel experience from the booking stage to check-out," with the goal of reducing the use of paper and plastic and also minimizing human contact, to the floating solar panels used in the Maldives by Lux Resorts in South Ari Atoll to protect coral reefs and reduce consumption of diesel fuel.

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Joe Rydholm can be reached at joe@quirks.com

In a time when so many marketing experts are imploring brands to understand and respond to consumers' emotional needs, many of the innovations cited in the report relate to assuaging fears – fear of infection, of course, but also fear of the increasing impacts of climate change. Beyond mere reassurance, though, they also give consumers a sense of agency, which could be an enormously worthwhile thing to tap into as we come out of months of feeling powerless to keep COVID at bay in the face of the selfishness of our pandemic-denying fellow citizens and the often negligent responses from elected officials. If an app or a brand will help me travel more safely or vacation in a way that lets me feel I am doing my small part to enhance and preserve the places I visit along with reducing my carbon footprint, sign me up.

www.quirks.com/articles/2021/20210102.aspx

Inspiring solutions and the next set of leaders

Meet SurveyMonkey's new market research GM, Priyanka Carr

SurveyMonkey

www.surveymonkey.com/market-research
marketresearch@surveymonkey.com

In August, SurveyMonkey named Priyanka Carr as the first general manager of the market research business. We sat down with Pri to get to know her and her vision for market research products and services at SurveyMonkey.

Pri, you have a long tenure with SurveyMonkey and a background in consulting and psychology research. Can you tell us about your career journey thus far?

I followed an untraditional path to my current role. I earned my Ph.D. in neuroscience and psychology at Stanford and then had the desire to try something in the real world. I ended up at Bain & Company, for the excellent culture as well as the opportunity to get exposed to a wider variety of industries and disciplines. When I had the itch to become more operational, I joined SurveyMonkey – a great product, a great business and an even more amazing culture. I built and led the strategy, corporate development and partnerships teams at SurveyMonkey and worked closely with the market research team. Recently, I was given the opportunity to lead our market research business as its general manager and could not have been more excited to take on the role.

How would you describe your new role as GM?

My charter as the GM of SurveyMonkey's market research business means building and bringing to market an amazing set of products that delight our customers and help transform the industry. No company is better positioned to do this than SurveyMonkey – we bring excellent technology, the largest corpus of feedback data and a customer-first mind-set to build solutions and offer services for the world's leading market research buyers. In addition to building our leadership position in the market, I also, just as importantly, spend time building the next set of leaders in my world-class team!

Whew! No small task. What do you do to recharge?

A toddler at home leaves very little time to recharge! But we have adapted – we love hiking and exploring whenever the weather allows! We used to be avid travelers and in our pandemic world we enjoy reminiscing about our travels. I enjoy good wine, vegan baking and reading great research and journalism.

What is your vision for market research solutions at SurveyMonkey?

Our market research solutions have been evolving over the last year to become a technology-first platform that delivers powerful insights with unparalleled speed. We have launched over a half-dozen expert solutions for product and creative testing, allowing customers to make decisions quickly and with greater precision in days instead of months. We will be adding dozens more solutions to our platform, driven by customer need and propelled by the digital transformation, to address all needs for quantitative market research – market measurement, segmentation, pricing optimization, product development and brand tracking among others.

What's one thing you want people to know about SurveyMonkey that they might not already know?

You may know SurveyMonkey as the world's leading, easy-to-use and beloved survey tool. We are that but so much more! We are a powerful quantitative market research platform enabled by high-quality data, industry-leading technology, AI-enabled analytics and a flexible services model that delivers on all your market research needs.

Want your firm to be featured in Insights Q&A? Contact sales@quirks.com for more information.www.quirks.com/articles/2021/20210166.aspx

The Marketing Research and Insight EXCELLENCE AWARDS powered by QUIRK'S

DESIGNED *for* SUCCESS

A look at some of the winning projects from the 2020 Marketing Research and Insight Excellence Awards

By Joseph Rydholm

Though the pandemic made an in-person gala impossible, it didn't stop the 2020 Marketing Research and Insight Excellence Awards ceremony from being held in November. Hosts Dan Quirk and Steve Quirk, along with comedian Moody McCarthy returning as emcee, donned evening finery for a virtual broadcast to present awards across an array of categories, from global marketing research project to outstanding young researcher. (You can view the broadcast at http://tiny.cc/s8h6tz.)

Thanks again to our entrants and judges, our partners the Market Research Council and the MREF and to the companies whose sponsorships helped make the awards possible: Canvs, Delvinia, Ipsos, MarketVision Research, MedSurvey, Opinium, OvationMR, ProdegeMR, Toluna and Zappi.

Space doesn't allow us to include writeups on all of the individuals, companies and teams who won (see sidebar for a full list) so this time around we've chosen to focus our recap on some of the winning projects, to give you an idea of the breadth of work that was up for consideration.

Unlike many recipients of professional awards, marketing researchers typically can't go into great detail during the ceremony about the work they've been nominated for since much of it is proprietary. (Only judges are privy to the details.) But as part of the application process, each entrant was asked to write a paragraph or two for public consumption on the methods used and the business factors involved and that's what we are presenting here.

If you like what you read below, why not get involved? The awards are open to all researchers worldwide. You can nominate yourself, your co-worker(s), your company or your clients so long as they meet the judging criteria for the category. Early-bird entry for 2021 nominations will open March 1. With the uncertainty around the pandemic and to ensure that potential travel restrictions don't prevent the awards from being as inclusive and global as possible, the 2021 awards ceremony will again be held virtually next November. Visit https://www.quirksawards.com for more information.

Advertising Research Project – 2020: Twitter and EyeSee

Women's participation in sports competitions has been on a steady rise throughout history, albeit lined with many hurdles to overcome. Inspired by the historic high in female participation at the postponed Tokyo Olympic games, where 48.8% of participants would be women, Twitter decided to take a deep dive into the way advertising portrayal of gender roles in sports influences brand perception and their consumers. By combining a mix of behavioral and explicit research methods, Twitter and EyeSee analyzed 12 ads to uncover the ways traditional and non-traditional gender roles affected ad performance in a busy Twitter timeline and how the gender of the respondent impacts ad perception. The case study helped researchers understand the nuanced approach necessary for addressing the gender gap in sports advertising in a social media environment.

B2B Research Project – 2020: Feeling Mutual and 2Europe

Fire-retardant technology company Zeroignition had a new chemical that is impregnated into materials like wood during manufacture to drastically improve fire-resistance. Anecdotally, Zeroignition believed this type of passive fire protection is overlooked by decision makers, who focus more on

Owen Hanks, Measure Protocol

Gracie McKinstry-Smith, Target

Kirsty Fuller, Big Sofa Technologies

The 2020 Marketing Research and Insight Excellence Award winners

B2B RESEARCH PROJECT • Feeling Mutual and 2Europe
QUALITATIVE RESEARCH IMPACT • Disney Channels Worldwide
TECHNOLOGY IMPACT • Measure Protocol
PANEL COMPANY OF THE YEAR • MedSurvey
BEST NEW PRODUCT/SERVICE INNOVATION • Big Sofa Technologies
CLIENT/SUPPLIER COLLABORATION • Verizon and buzzback
OUTSTANDING YOUNG RESEARCHER • Gracie McKinstry-Smith
GLOBAL MARKETING RESEARCH PROJECT • Opinium and Ancestry
NONPROFIT/SOCIAL ENTERPRISE PROJECT • Southwark Council, Shared Intelligence and Analogue Strategies
GROUNDBREAKING RESEARCH PROJECT • InSites Consulting and Anheuser-Busch
ADVERTISING RESEARCH PROJECT • Twitter and EyeSee
HEALTH CARE/PHARMACEUTICAL RESEARCH PROJECT • Healthcare Research Worldwide and RealityMine
MARKETING RESEARCH SUPPLIER OF THE YEAR (2019 REVENUE BELOW $10 MILLION) • EyeSee
MARKETING RESEARCH SUPPLIER OF THE YEAR (2019 REVENUE AT OR ABOVE $10 MILLION) • Zappi
BEST CLIENT-SIDE TEAM (WITH LESS THAN 10 RESEARCHERS) • Liberty Mutual Insurance
BEST CLIENT-SIDE TEAM (WITH A DEPARTMENT OF 10 OR MORE RESEARCHERS) • BT
RESEARCHER OF THE YEAR (END-CLIENT) • Michelle Gansle
RESEARCHER OF THE YEAR (SUPPLIER) • Christopher Barnes
MREF EVERYDAY HERO • Sabina Ramdas
MREF PHILANTHROPIC COMPANY OF THE YEAR • Research Results

"One of the biggest learnings was the power of an open, collaborative briefing and research design processes. The idea that the researcher and client are the only ones who can input into a survey is wrong. By bringing the ad and PR agency into the process, we developed the ingoing hypotheses even further. This ensured we had the right questions in place, to get the data required, to tell the most compelling story."

– Tom Woodnutt, Feeling Mutual

active fire protection like sprinklers. To validate this, Zeroignition needed a quantitative study with senior decision makers like architects and construction CFOs. This would inform its marketing strategy and provide the basis for thought-leadership in the industry. Feeling Mutual designed a collaborative process involving the client, advertising and PR agencies. It worked with specialist B2B quantitative research consultancy 2Europe, who conducted 25-minute phone surveys.

The research validated the hypotheses and not only shaped the marketing strategy but also generated 41 pieces of coverage in the first three months, with a combined readership estimated at 150,000. After its release, three of the biggest wood industry associations got in touch with Zeroignition's CEO.

Global MR Project – 2020: Opinium and Ancestry

As the global leader in family history, Ancestry viewed the 75th anniversary of the end of WWII as an ideal opportunity to tap into renewed consumer interest in history in general, and family history in particular, across the U.S., U.K., Canada, Germany, France and Australia. To do this successfully, the brand needed to understand and navigate the cultural, emotional and often deeply personal connections consumers have to WWII in each market. Through an iterative and dynamic research project, Ancestry and research partner Opinium not only navigated this uniquely complex topic but laid the foundation for one of the genealogy site's most successful multi-market campaigns ever. The insights from the research enabled the development of a compelling global platform that could be tailored to highly distinct market contexts with clear recommendations on themes and sub-themes, imagery and key relationships with relatives.

Groundbreaking Research Project – 2020: Anheuser-Busch and InSites Consulting

Anheuser-Busch has a strong commitment to bring back growth to beer. In 2018, it overhauled its product development process with people-centricity at the core. A-B partnered with InSites Consulting to start a strategic initiative coined "iWeek." The core of iWeek is a one-week innovation event, taking the A-B team outside of their daily environment and responsibilities to fuel ideation. Overnight idea testing with target consumers allows the team to iterate ideas generated the previous day and qualitative consumer touchpoints further enhance consumer empathy. The overhauled process used to take almost two years from insight to shelf and can now be executed in less than 100 days.

Health Care/Pharmaceutical Research Project – 2020: Healthcare Research Worldwide and RealityMine

In rare and invisible conditions, digital patient influencers play an important role in sharing experiences and making connections to form community. But where do patient influencers get their information from? And how do they use

"From online communities to uncover new insights and collaborate with people throughout the process, to overnight screening of ideas, the goal was to bring in methods that could accelerate the process. As a result, A-B drove 50% of the industry innovation volume in the last two years, up from 10% in 2017."

– Thomas Troch, InSites Consulting

this information in the content they post? In a self-funded study, Healthcare Research Worldwide partnered with behavioral data technology provider RealityMine to develop a novel methodology to overcome the limitations of self-reporting using passive measurement of digital media consumption. The study demonstrated important distinctions with implications for digital research, including gaps between behavior and recollection, and between posting and influencing – with findings benefiting academic research, the digital health industry, and the National Health Service.

Nonprofit/Social Enterprise Research Project – 2020: Southwark Council, Shared Intelligence, Analogue Strategies

London's Southwark is one of the most culturally and economically diverse boroughs in the U.K. Its youth offer is widely integrated with other services, with 24 local plans and strategies referencing children and young people. This level of integration shows passion and commitment but also brings the risk of losing clarity of purpose. This project was designed to redefine that purpose, against a backdrop of a decade of budget cuts, a paradigm in which youth services are seen by many as purely a crime-prevention tool and uncertainty about the future of youth service provision. Shared Intelligence and Analogue Strategies were commissioned to design and deliver an innovative research plan with young people and stakeholders, including training a team of young people to co-deliver ethnographic research. The findings informed a new vision for the youth offer in Southwark, putting the voices of young people at the heart of the strategy.

Qualitative Research Impact – 2020: Disney Channels Worldwide

YouTube is a titanic force molding kids' worldviews. It's kids' most-loved media brand, their No. 1 daily media destination and has upended kids' standards of what makes their favorite stars engaging and likable. Disney Channels Consumer Insights identified the four underlying need states that drive every child aged 2-14 to YouTube and YouTube Kids and distilled them into an innovative content strategy that is brand-building, rooted in what kids love about Disney Channels, and ensures cultural alignment between Disney Channels and YouTube. This 12-month, multiphase study, fueled by insights from kids, parents and YouTube experts, provided: an evergreen framework for understanding the role of YouTube in kids' lives; a new content strategy for Disney Channel and Disney Junior that is rooted in brand and human truths; and led to new ways of Disney Channels' YouTube content being algorithmically-optimized to win viewers.

"A massive research project like this can offer great insights but we found that in order for the insights to truly translate into action, we needed to tailor them to each team throughout our organization. Via custom workshops, we were able to create an engaging, effective and rewarding forum that not only transformed the insights into tangible action items for stakeholders but also helped deepen their understanding – and therefore acceptance of – the insights themselves. Today, our more integrated relationship with each team continues, because lasting change requires ongoing, conscious effort and advocacy."

– Andrea Acevedo and Gretchen Betzholtz, Disney Channels Worldwide

IN FOCUS

••• a digest of survey findings and new tools for researchers

// Survey Monitor

••• advertising research

Just a temporary lull

COVID-19 won't slow digital ad spend

Although the COVID-19 pandemic slowed the growth of digital advertising, online ads were still expected to increase their market share in 2020, according to data from Buy Shares. After a sharp fall in ad spending in March, the last few months of 2020 witnessed strong growth across all regions, as millions of consumers shifted to websites and online retailers from brick-and-mortar stores. According to the study, the trend is expected to continue in 2021, with global ad spending growing by 14% year over year to $395 billion.

In 2017, brands and media buyers spent $251.7 billion on digital advertising worldwide, revealed Statista Digital Market Outlook. Over the next two years, this figure jumped by 33% to $335.7 billion. However, the pandemic triggered a sharp fall in ad spending between January and March 2020, as one-quarter of media buyers and brands paused their budgets in a time of economic uncertainty. Nevertheless, many of them adapted to a new environment where businesses and consumers were getting used to living with COVID-19 and adjusted their budgets in response. As a result, global digital ad spending was expected to grow 3% year over year to $345.9 billion in 2020.

Statistics show that ad spending in the classifieds segment is expected to drop by 2.1% year over year to $18.5 billion in 2020. By the end of 2021, this figure will jump over $19.7 billion

Video ad spending was projected to rise by 4.1% year over year to $27.8 billion in 2020. Over the next 12 months, this figure is expected to jump to $30.9 billion. Banner ad spending is forecast to hit $58.6 billion in value in 2021, a $6.5 billion increase year over year.

Statista data indicate the search advertising segment is expected to witness the most significant boost in spending and grow from $148.5 billion in 2020 to $172.2 billion in 2021, a 16% jump year over year. The social media ad spending follows with a 15% year-over-year increase to $113.6 billion in 2021. Statistics show the global digital ad spending will continue growing in the following years and hit $447.4 billion in value by 2023.

Recent years have witnessed a surge in the use of mobile phones, which had a significant impact on the digital advertising industry. To keep up with consumer demands, generate higher revenues and boost their brand name, companies had to create user-friendly mobile ads.

In 2017, 45% of the total digital advertising spending was generated through mobile devices. Mobile advertising continued growing in the last three years and hit a 55% market share in 2020. Statistics show this figure is set to jump to 57% in 2021 and by the end of 2022, mobile ads will account for almost 60% of total digital ad spending.

Analyzed by geography, the United States represents the world's leading digital advertising industry, expected to hit $129.4 billion in spending in 2020, a 0.3% drop in a year. However, this figure is forecast to jump by 17% and reach $151.5 billion in 2021.

Digital ad spending in China, as the second largest market globally, is expected to grow by 9% year over year to $77.7 billion in 2020. The United Kingdom, Japan and Germany follow with $21.8 billion, $15.8 billion and $9.8 billion, respectively.

Statistics show the combined ad spending in the top five digital advertising markets is expected to jump by 14.5% year over year and hit $291.5 billion value in 2021.

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••• employment research

I, co-worker

Automation eases business processes during COVID-19

The ABBYY Global COVID-19 Technology Survey investigated the impact of COVID-19 and automation technologies on office workers in 20 industries across the U.S., U.K., France and Germany.

The study found that three-quarters (74%) of workers experienced challenges since the pandemic began, with one in four wanting to quit their job because of poor business processes. Nearly half of staff (48%) blamed bad processes for making their job more challenging – with a third saying they waste time. When identifying the cause of their biggest challenges, 40% of workers blame a lack of information on solutions or tasks, while 32% blamed not having the right IT tools.

In asking what tools could make their job better, the top three answers were communications tools (70%), task monitoring (43%) and AI (39%).

Software robots are being used by 46% of respondents, who reported that they spend up to two hours a day with their digital co-worker. Of those working with digital co-workers, 34% said they were most helpful at sorting and classifying data and documents. Sixty-four percent of companies adopted new technologies and processes for the first time during the lockdown to help alleviate the stresses of remote working. Those using digital workers estimate that they save them an average of 26 hours a week in productivity.

Those who wished they had a digital co-worker said they would use them for digitizing paper, prompts and classification purposes and could save 54 days per year using a digital colleague.

As the survey results show, organizations continue to face rising challenges when it comes to quickly and accurately processing content such as documents, forms, images and e-mail communications. The survey revealed that 76% of tools used to help with processes, digitizing the automation and content within paper and onboarding new clients were deemed successful for respondents, including tools for moni-

••• small business research

The long haul

Women-owned businesses suffer under pandemic strain

COVID-19 has caused incredible strain for business owners across the U.S. and globally. KeyBank surveyed women business owners to better understand their personal outlook and found that confidence is falling compared to previous years of conducting the same survey. In two years, the number of respondents who say they are confident in their personal finances in the future experienced a 22% drop. Another 23% drop occurred for business owners who say they are confident in the financial health of their business over the last two years.

About one in three women-owned small businesses have low optimism that they will achieve their business goals over the next year, mostly due to the pandemic and economy. Six in 10 women business owners report the pandemic directly impacted their business negatively. Among all respondents, the effects of the pandemic are creating three big challenges that stand out: 40% cite adjusting to a new operating model while 36% say they are having trouble attracting customers and another 36% say they are having trouble maintaining staff productivity.

For one in four women-owned businesses right now, cash-flow management is a problem. Without that flow, many businesses are putting expansion plans on hold. In 2019, 90% of respondents said they planned to expand within the next two years. That has now dropped to approximately three-quarters.

Confidence in the financial abilities of businesses is also falling. The ability to handle accounting and finances is down 11% from 2019, while the confidence in ability to obtain credit is down 13% and the confidence in ability to conduct negotiations is down 10% in one year.

Optimism has also faded among women business owners with age playing a critical factor in the responses KeyBank found. Overall, while only 46% of the total businesses surveyed were confident about achieving their goals over the next year, down from 71% just two years ago, it was Millennial business owners who had more optimism. Sixty percent of those under the age of 35 were optimistic about the future.

In August 2020, respondents gave their best estimates for when they thought business will return to normal for themselves, with a minority saying one to three months (5%) and others reporting four to six months (22%), seven to 12 months (32%) and more than a year (25%). Three percent of respondents said that business may never return to normal for them, while 8% said that it's already returned to normal and 7% reported that their business was not affected by the pandemic.

The survey was conducted by Schmidt Market Research with a third-party panel, Dynata, gathering results from 305 total respondents. The survey was conducted in August 2020.

toring employees' tasks. This points to the growing trend of many organizations that are now turning to technologies like content intelligence, process mining and task mining to support their digital transformation efforts.

The survey was conducted by Opinium on behalf of ABBYY in November 2020 and surveyed 4,000 office workers in the U.S., U.K., Germany and France.

••• nonprofit research

Holding steady

Organizations maintain 403(b) practices during pandemic

A snapshot survey by the Plan Sponsor Council of America has found that the vast majority (83.6%) of nonprofit organizations with 403(b) plans are holding steady and not changing their contribution levels despite the financial pressures of the COVID-19 pandemic.

Some nonprofit organizations plan to suspend matching contributions (6.3%), suspend non-matching contributions (4.1%), reduce matching contributions (3.4%) or reduce non-matching contributions (3.4%).

While the majority of organizations did not plan to change employer contributions in 2020, nearly a third of higher education institutions said they either have, or would by year-end, reduced or suspended contributions to their 403(b) plans. Ten percent of all respondents suspended or reduced the matching contribution and 7.5% suspended or reduced the non-matching contribution.

Nonprofit organizations across industries noted an increase in hardship withdrawals since COVID-19, including health care and hospitals (52.2%); higher education, including faith-based (36.0%); research, science or environmental (31.3%); K-12 education (18.5%) and other (15.8%).

Similarly, while three-fourths of plans indicated they had not noted an increase in plan loan activity since the beginning of COVID-19, just more than a third (36.0%) of hospitals and health care organizations noted an increase, as did nearly 30% of higher education institutions. However, those sectors were a relatively small sampling of the overall survey.

While more than 70% of organizations reported no change in the volume of hardship and in-service withdrawals for 2020, more than half (52.2%) of hospital and health care systems did cite an increase in participants tapping their accounts. More than a third of higher education institutions also noted an increase.

The study was conducted by the Plan Sponsor Council of America and surveyed 300 nonprofit organizations in October 2020.

••• grocery research

Shift to online

Shopping habits will continue after pandemic

An Oracle Grocery Retail survey shows that 53% of respondents in the U.S. have shopped online for groceries during the pandemic, with 37% stocking up more frequently online than in-store. Few people plan to reverse course – 93% of those surveyed said they plan to shop online for groceries post-pandemic, with 74% noting they will order groceries the same amount or more as they are doing currently.

When it comes to online grocery ordering, the vast majority of consumers opt for home delivery. Seventy-two percent have groceries delivered to their home, 13% pick them up inside the store and 15% collect their groceries curbside.

A significant percentage of all age groups surveyed have ordered groceries online during the pandemic, with Generation X leading the way (72%). Gen Z also favors this route, with 61% of this cohort ordering groceries online, along with 60% of Millennials and 30% of Baby Boomers. Although Boomers represented the lowest total overall, this age group saw a 173% increase in those who had ordered groceries during COVID-19 versus before the pandemic. Moreover, 83% of this demographic plan to continue ordering groceries online. Interestingly, those with kids were also more than twice as likely to order groceries online (82%) versus those without children (36%).

With grocery shortages during the pandemic, 86% of shoppers explored store-owned brands and private-label alternatives, with some having no plans of returning to their old favorites. Thirty-two percent intend to stick with the store brands while 34% will shop a mix of new finds and preferred brands and 20% will go back to preferred brands.

Despite COVID-19 winter warnings, shoppers are worrying less about shortages of essential items. Just 28% of those polled are planning to stockpile household essentials and pantry staples, including toilet paper (69%), cleaning products (69%), canned fruits and vegetables (54%), meat (50%), soup (48%), pasta (48%) and rice (46%).

With more shoppers eating at home and looking for inspiration, meal subscriptions have increased, with 22% continuing a food or meal subscription they already had, 10% already enjoying one food or meal subscription service and adding another and 4% starting a new food or meal subscription for the first time.

The Untold Insights survey was conducted on behalf of Oracle Retail and polled 521 U.S. consumers in September 2020 and another 500 in November 2020.

••• travel/leisure research

Packed and (almost) ready

Australian travelers react to current and future rules, restrictions

Over a third (34%) of Australian travelers have already considered booking somewhere to stay in order to work from a different destination, while two in five (43%) would be willing to quarantine if they could work remotely, according to 995 Australian respondents surveyed by Booking.com as part of a worldwide survey of 20,000 travelers.

Working remotely has irreversibly entered the mainstream during the pandemic, with the effect that people will look to take longer trips in the future that more effectively combine work and pleasure. Accommodations will prioritize showcasing home office facilities in an attempt to attract this new wave of digital nomads. Likewise, the world of corporate travel will see increasing demand for privacy, cleanliness and longer stays among those traveling for business, requiring alternative accommodations to up their "work-friendly" game. While companies will undoubtedly reassess their approach to business travel in the future, workers will continue to maximize the trips they do take, with half of Australian travelers (50%) saying they would take the opportunity to extend business trips to enjoy leisure time at the destination.

With 41% of Australian travelers wanting to travel more sustainably in the future, travelers are likely to develop a more eco-conscious mind-set, as COVID-19 has increased consumers' awareness about responsible choices. Two-thirds (62%) expect the travel industry to offer more sustainable travel options and travelers will consequently visit alternative destinations in a bid to avoid traveling during peak season (52%) and times of overcrowding (50%). Additionally, COVID-19 has inspired more than half (52%) of travelers to consider reducing waste and/or recycling their plastic when traveling again.

Australian travelers believe that the industry must adapt to this sustainable mind-set by offering more attractive off-season travel packages (47%) and proposing alternative destinations to prevent overcrowding (32%). Over two-thirds (68%) of Australians indicate that they want their travel choices to also support the destination's recovery efforts and more than half (54%) want to see how their money is going back into the local community.

Tech innovation will adapt to a new type of traveler and will play a crucial role in rebuilding traveler confidence. Already, six in 10 Australian travelers agree that technology will be important in controlling health risks when traveling and 61% say that accommodations will need to use the latest technologies to make travelers feel safe. Almost half (46%) will want tech options to make last-minute restaurant reservations and about the same amount (48%) will want more self-service machines instead of ticket desks. Forty-seven percent are also excited about tech's potential to further personalize their travel experiences in the future. Almost three in 10 (29%) would feel more comfortable about going to an unknown destination if they could scout it beforehand using virtual reality.

The financial legacy of COVID-19 will inevitably see people demand more bang for their buck in the future. Sixty-three percent of Australian travelers will be more price-conscious when it comes to searching and planning a trip in the future and 53% are more likely to hunt down promotions and savings, behaviors that will likely last years.

But the value consumers expect will go beyond price tags; three-quarters (74%) stated they want travel booking platforms to increase their transparency about cancellation policies, refund processes and trip insurance options. Furthermore, 51% consider refundable accommodation a must-have for their next trip, as do almost half (38%) when it comes to the flexibility to change dates without being charged. Travelers are keen to support the industry in its recovery (71%) and want their future bookings to help rebuild communities around Australia and the world (68%).

Almost three in four Australian travelers (74%) will take more precautions due to COVID-19 and will look to the travel industry to help them gear up for this new normal. Sixty-five percent of travelers will avoid certain destinations (rising to 67% of Baby Boomers) and 72% expect tourist attractions to adapt to allow for social distancing. At the same time, 65% will only book a particular accommodation if it's clear what health and hygiene policies it has in place.

Short-term, there will also be a change in transport preference and provisions, with under half (41%) opting to avoid public transport. This will cause a longer-term shift in how people will travel to and around their vacation destinations, with more people choosing to rent or drive their own car. Just as we have become accustomed to traveling without liquids in our carry-on luggage and removing shoes to go through airport security, 62% will accept traveling to destinations that have health spot checks on arrival and 42% will accept wearing a mask in public. Quarantine measures will remain less popular, with far fewer (27%) travelers willing to accept these in order to travel to a particular destination.

Research was commissioned by Booking.com in July 2020 and was conducted among a sample of adults who had traveled for business or leisure in the previous 12 months and planned to travel in the next 12 months (if/once travel restrictions are lifted). In total 20,934 respondents across 28 countries were polled, including 995 from Australia.

QUIRK'S

OUTLOOK 2021

COMMENTARIES BY INDUSTRY LEADERS ON THE YEAR AHEAD

Welcome to Quirk's Outlook 2021! We asked research companies to offer up their viewpoints on a range of topics – from the future of data democratization to fraud mitigation strategies – to delve into some factors that will make an impact in the year ahead.

Pollfish discusses DIY market research and how it has powered the shift to in-house research caused by COVID-19. Radius-Illumination explores the ways in which agile research must become more robust to continue developing innovative offerings in 2021. Confirmit shares the keys to successful data democratization. Murray Hill National reveals its COVID-19 journey and how respondent recruiting will look in the year ahead. Informed Decisions Group provides insight into how eye-tracking can optimize retail product placement. Toluna and Harris Interactive delve into agile new product development solutions. Decision Analyst tackles the issue of waning brand awareness in the U.S. Potloc looks at how sampling on social channels provides a clear path to respondents. iResearch Services provides background into current challenges that B2B marketers face. And InnovateMR discusses best practices for survey design and fraud mitigation to maximize quality data.

We hope this section will provide a glimpse into 2021 and a sample of tips and tricks to help make this year a success!

TABLE OF CONTENTS

QUIRK'S OUTLOOK 2021

DIY RESEARCH

Pollfish

DIY market research is here to stay

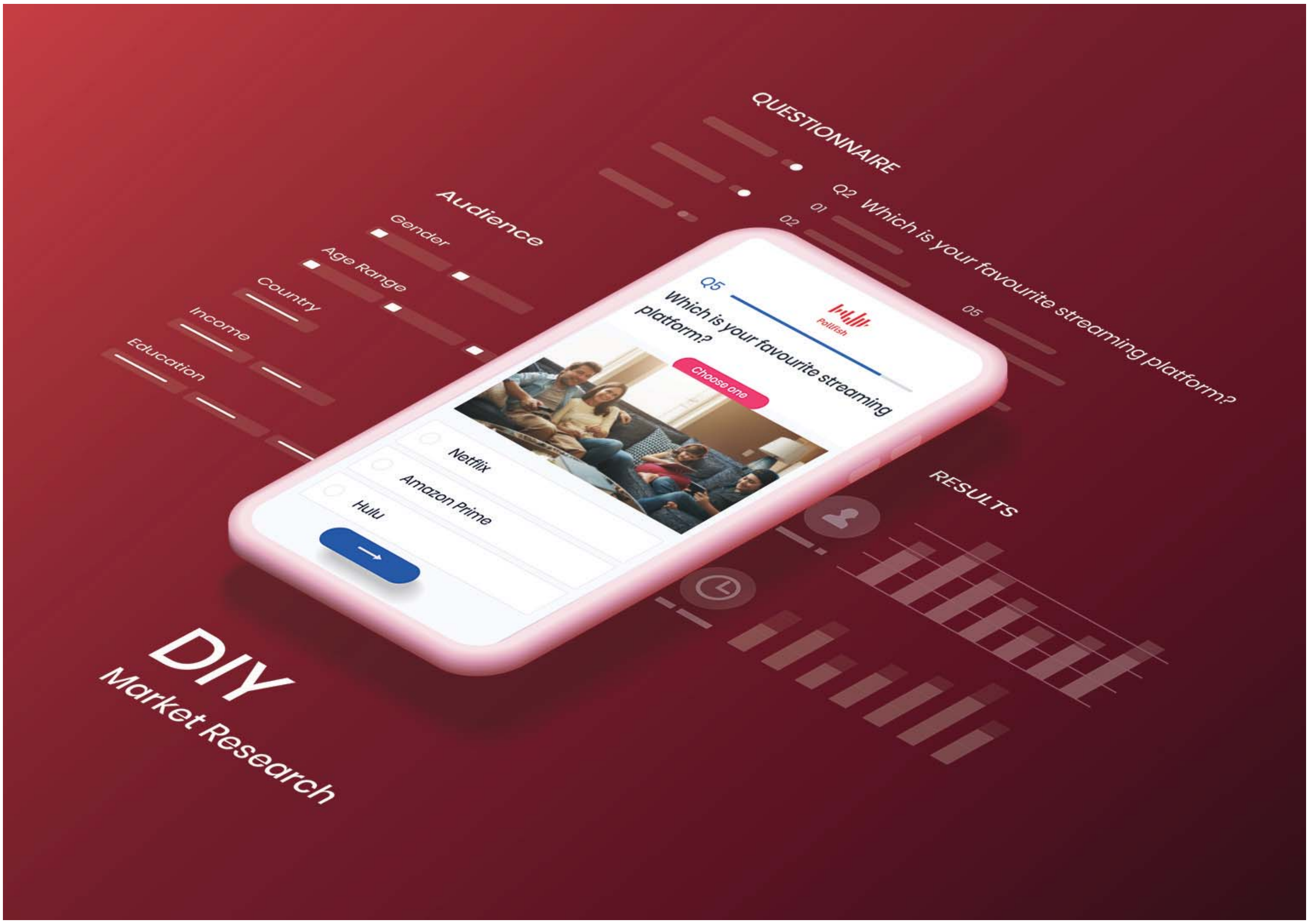
As research tools became faster, easier and more cost-effective, DIY companies were positioned to power the shift to in-house research caused by COVID-19

BY JOHN PAPADAKIS
Founder and CEO, Pollfish

The COVID-19 pandemic has caused a dramatic shift in the way companies operate. The healthy research budgets from businesses and corporations of every size shifted dramatically overnight. Many were forced to slash their market research budgets. The entire industry saw a projected 25% reduction in revenue last year. This has sadly resulted in furloughs and layoffs.

This should not come as a shock to anyone working in the market research industry. But what may come as a shock is how corporations ultimately coped with reduced research budgets at a time when market research was going to be more important than ever.

When dealing with a once-in-a-cen-



tury occurrence, past market insights go out the window. The unique nature of the pandemic meant companies needed a fresh look at their customers and needed to challenge many of their long-held assumptions. With the need for new consumer insights within a drastically reduced budget, businesses large and small turned to DIY market research companies to help them bring their research teams in-house.

We know this because we are one such market research company.

At Pollfish, not only did we not see a downturn over the last nine months, but we've actually grown. I say this not to gloat but to offer a compelling, first-person account of the state of the DIY market research industry and to make a prediction about where the market research field is headed in 2021 and beyond.

When the dust settles on the pandemic, the market research industry will look a lot more DIY than it did before and there are very good reasons for that.

Why COVID forced a shift to in-house market research

COVID-19 has impacted nearly every aspect of the global economy. Things like travel, in-person retail, sporting events, concerts, personal get-togethers and even our schools and corporate office culture suddenly shifted. A lot has been written about the impact of this last point on the future of the workforce. Make no mistake, the remote work experiment has shown that there's truly no going back to a geographically limiting, in-person way of working. But remote work wasn't invented by the pandemic. It had grown slowly over many years. When COVID struck, it was at a point of maturity where it could capitalize on the situation. For many businesses, it has been considered a savior that allowed them to weather an incredibly unpredictable economic storm.

DIY market research forged a similar path. Its growth didn't happen in a vacuum. As our own growth over the last years shows, it has become a viable and useful way to bring market research in-house. At Pollfish, we've iterated and improved our offerings consistently in order to compete with more traditional market research companies. By the time the pandemic hit, we'd carved out a healthy portion of the research market and were poised to make robust gains in the coming years. Like the remote-work industry, we'd reached a level of maturity that allowed us to step into a much larger role once the pandemic made it a necessity.

What this means for 2021 and beyond

But past performance is no guarantee of future results. It would be easy to point to the remarkable circumstances in which we are currently living to explain – and explain away – the long-term impact of DIY market research tools. Frankly, that would be a mistake.

It was no fluke that DIY companies were positioned perfectly to step in when the pandemic put so many others in our industry out. Any assumptions about a return to the past once the pandemic has subsided ignore the many benefits companies are enjoying thanks to DIY research solutions.

An agile approach to market research

Self-serve market research is inherently more agile than more traditional approaches. Rather than conduct several major, expensive and comprehensive market research studies over the year, users of DIY tools can make near-constant queries of their customers. This fast, easy and ultimately cost-effective approach also creates a clearer picture of consumer sentiment that can be tested and retested just as easily.

To accomplish this, the DIY market has had to innovate new, cutting-edge research methods that are more adaptable to changes in consumer behavior as well as the changing needs of corporations. This means using technology to reach respondents in a more organic way, ensuring randomness and the required representative sample.

Businesses can be more flexible

With access to iterative data, consumer sentiment can be discovered much more quickly. This allows decision makers to remain flexible to the needs of their consumers and provide more opportunity to anticipate the direction certain trends are heading. The result is a richer universe of data in which companies can determine the insights they need. This is something that will increase in importance.

Better in-house analysis teams

Data teams have swelled over the last decade with companies large and small seeing the benefits of high-quality data analysis that can be done in-house. For high-functioning data teams to succeed they need access to large amounts of reliable data. They also need the flexibility to quickly change parameters and test hypotheses in real time. DIY market research tools give them just that, making them capable of determining customer sentiment at a scale and pace that couldn't be fully realized until now.

Putting research into the hands of decision makers

The last reason DIY market research is here to stay is the broad access to data that these tools allow. The barriers to entry are lowered significantly with DIY tools. Trained data scientists aren't the only ones who can analyze and understand market sentiments. DIY tools are so easy to use that the very decision makers themselves can use them. The ease, speed and reliability of these tools make fast changes to market conditions possible. The emergence of DIY tools allow for a broader range of people with more diverse backgrounds and skill sets to take part in reliable market research gathering. The expertise and viewpoints can lead to insights that may have been previously missed.

A realistic assessment

While it is true that DIY solutions require certain investments to maximize their impact, the long-term benefits far outweigh any of the costs. The more team members that are taking part in market research, the more training will be required to collect and analyze those findings. This takes time and money. It means companies will have to change their approach to market research in fundamental ways. For instance, DIY market research is best used when it is iterative, which means more frequent querying of consumer sentiment. This can sometimes make for confusing data and analysts need to understand how to tease the truth from the noise in the numbers. None of this is new, mind you. What is new is who is doing it and the speed and scale with which it is happening.

There's no mistaking that traditional market research techniques have their place in a post-COVID market research industry. But DIY alternatives, with their speed, scale and broader access to data, will continue to be an important part of the landscape. We believe that these tools will make up a much greater share of the market research budgets across all industries. Those investments in time, human capital and resources spent in the short-term were smart investments that will continue paying dividends long into the future.

COVID-19 didn't invent the adoption of DIY market research but it did accelerate it. The benefits of this approach to acquiring consumer sentiment that companies saw in 2020 will make it a steady force for years to come.

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QUIRK'S OUTLOOK 2021 AGILE RESEARCH

radius illumination

Customer needs will rapidly shift again in 2021

Developing innovative offerings requires a new kind of agile research

BY SHARI AARON
SVP, Growth and Innovation, Radius-Illumination

A year ago, most brands were well on their way to activating their 2020 strategies. They had a clear plan for brand growth and were capitalizing on a booming economy. Brands knew where they stood with customers and where they needed to go. Then everything turned on March 13th with the declaration of a national emergency based on the coronavirus spread. Every brand's 2020 playbook was either jettisoned or severely altered at that point.

The resulting need to work and learn from home, as well as social distancing requirements, forced brands in virtually every industry to quickly adjust their products, services and selling strategies based on rapidly changing customer needs. Developing new offerings required a level of speed, flexibility and agility that most brand teams had never experienced before. On top of it all, most brand teams were, and are, continuing to work remotely, making brainstorm sessions more challenging.

To sustain or regain growth in 2021 and beyond, brands will need to continue generating innovative offerings and experiences as it is certain customer needs and behaviors will change again. The speed of these customer changes will not slow down, which means brand teams will rely even more heavily on quick and agile research approaches to stay ahead of the innovation and new product pipeline. Technology will play a role in innovation development but it cannot be the only driver in the agile research necessary to speed new and relevant ideas to market.

The need for innovation speed – and depth

Agile research is typically thought of as deploying software technology to quickly gather customer data or accelerating the process and project management in some way. As in all industries, market research has benefitted from technology and tools to increase speed of data collection and project delivery.

However, the investment in new product or service development is too great and the ROI too critical to brand success to rely only on "speedy" agile research. Developing new offerings requires that the "creative" part of early-stage development – the brainstorm sessions between internal teams and the co-creation with consumers – is allowed to flourish to identify the most compelling offerings.

What's needed in 2021 is agile research that is the right mix of technology and talent – the people with the expertise in generating

early-stage ideas, leading co-creation with customers and aligning internal stakeholders on making the right choices for brand growth. A rapid process for concept ideation, iteration and validation should be led by innovation experts who can guide your team in identifying high-potential opportunities, as this ensures more successful outcomes from your investments.

Innovation success requires this new kind of agile research that is both robust and holistic, combining these five elements in one solution:

1. An approach customized for your brand

No one size fits all when it comes to agile research. You're not choosing a software or a DIY tool but brand and marketing professionals who

Agile + robust innovation development: 30 days or less to results

take the time to understand deeply the complexity of your brand. This includes the pain points that you are solving for and who your target audience is, as well as the guardrails of what a company can or cannot do. They also customize the approach to take into account your current practices such as existing concept testing systems. Your insights partner should be willing to evaluate what you are using to see which ones are most predictive of success and incorporate those into the approach.

2. Ability to deliver deep insights, not just speed
Traditional innovation development uncovers robust insights. But this approach typically takes months, which doesn't work in this fast-changing environment. Super-rapid agile research tools don't dig deep enough into customer behaviors and needs. A successful innovation solution uses digital tools to accelerate the ideation and collaboration and is immersive enough to deliver the deep, strategic insights necessary for game-changing, business-building new ideas.

3. Real-time, ongoing co-creation with customers
An online survey measures the attitudes and preferences of your customers at that moment in time and can be limiting in allowing a customer to play with a new idea or build on it. An agile research approach for innovation development is built around real-time, ongoing sessions with consumers – for example, webcam triads over a period of days to test potential concepts or a three-day online bulletin board among target consumers to allow posting of thoughts throughout their day. In-home ethnographies also generate contextual understanding key to identifying the nuances that can lead to breakthrough ideas.

4. Technology and talent for productive virtual team collaboration
For innovation to be successful, you have to get many hands and feet inside a company to be moving in the same direction. However, team alignment in a remote environment can be challenging. The right insights partner plans relentlessly to ensure each session goes as is needed to be successful. You don't want to run the risk of having team members disengaged or the sessions can result in less-than-stellar new ideas.

5. Seamless flow between consumer and team ideation
A strong agile insights partner understands how to keep things moving fluidly between team alignment and consumer learnings and from concept ideation through validation. The innovation development process should capture team decisions, customer insights and the activation plan in a formal document to socialize the innovation plan throughout the organization.

Agile + robust can coexist

The traditional innovation development approaches often take months to produce concepts and ideas that a brand team can move forward within the organization. This new agile approach adopts the best of today's technology tools with expert insights facilitation and guidance. It allows deep immersive consumer learning and team ideation to be integrated into fast, agile (even overnight) online quantitative studies and screeners. The first team alignment through optimization and assessment can take as little as several weeks.

Now more than ever, a brand's growth journey depends on delivering relevant products and experiences using an agile and robust development process that combines the right talent and technology tools to ensure depth is not traded away for speed alone.

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QUIRK'S OUTLOOK 2021

DATA VISUALIZATION

Confirmit

Market research: The key driver for the democratizing of data?

As we become increasingly inundated with data, the success of data democratization relies upon the right data being shared with the appropriate audience to deliver impactful insights

BY ALEXANDER SKORKA
SVP Product Strategy, Confirmit

It's been a long time since a lack of data was a problem for decision makers. Over the past 20 years, it has become easier and easier to capture the views of people and markets live, through almost any channel, directly or indirectly. Couple that with the myriad sources of additional information that add context to feedback and surveys and there is plenty to work with.

This data lake has become a flood and the challenge now is how to navigate it, identify what is useful and, most importantly, effectively share that with an audience who can use it to derive value.

Market research agencies who can harness this flood and help their clients to succeed have a huge opportunity to expand their offerings, add new revenue streams and carve out a niche in a crowded market. But how can you do it in an effective, productive and profitable way?

Why is sharing insight a challenge?

Simply put, we are all different and our brains process and react to information in different ways. Many of us who consider ourselves MR professionals have naturally analytical brains and for us, a crosstab or some conjoint analysis is a beautiful thing. But these tools are not always – or indeed often – useful for our audiences.

We have established that a lack of data isn't the issue. In some cases, response rates are even going up. The challenge is that huge data lake and the format of the information within it. For many, the task of integrating it and delivering it effectively is the biggest hurdle.

Let's take a step back. What do clients need?

Ultimately, businesses need insights to drive decision-making. In a world where everything is prefaced with the phrase "data-driven," no one wants to be seen to be winging it. As researchers, then, our job is to support our clients in that goal. We need to make it easier for people – not just data geeks – to understand the information at their fingertips.

The good news here is that while data collection becomes increasingly commoditized through DIY survey tools, there is huge opportunity for MR agencies to deliver value in the way they communicate that data.

It is increasingly evident that relevant data must be available to all stakeholders in a company – not just the C-suite and senior management. Properly presented data empowers smart decisions faster across an entire

company. This is particularly true in times of remote work.

Democratizing data

The democratization of data means that everyone in the company who must make fact-based decisions – from the C-suite to the front line – has direct access to data. However, there is a small problem here: Not everyone has the skills and experience to independently analyze and interpret the data relevant to them. Of course, in the future employees should be trained in data literacy more than before. They should have tools available that enable them to use data independently, such as self-service data discovery tools. But apart from the effort involved in training, employees often lack time to home in on data and get to the key drivers that will lead to smart decision-making. This is where the power of data visualization and reporting technologies such as interactive storytelling dashboards comes in. They tell a story with insight and make it much easier to navigate the oceans of data that decision makers are faced with. They provide data in a way that is easy to consume, understand and most importantly, they are interpretation-proof, so that they can be used by everybody who needs them.

The go-to approach for many years has been the PowerPoint deck. It's probably the most frequently requested output from clients and has certainly served its purpose for many years. To be clear, all that follows does not suggest that PowerPoint will go away any time soon, simply because people giving presentations isn't going anywhere either. What I do believe, though, is that researchers need to focus more on revealing the core messages in the data, linking findings to business objectives and providing a focused story tailored to the respective audience. The time in which all questions of the questionnaire were visualized on dozens of PowerPoint slides is coming to an end. In addition, the time pressure and complexity in market research is increasing. Customers demand answers the moment the questions arise. Needless to say, it is difficult to foresee all these questions in the initial PowerPoint deck provided to the customer. At the same time, customers ideally expect the answer right away without delay.

But all this should not worry us. Researchers today are in a position to start offering a much wider range of channels through which to share insight – from PowerPoint decks to infographic dashboards to self-service data discovery. These are channels that businesses can go back to time and again to access live data that will help inform decision-making in a way that a static PowerPoint deck simply won't.

If researchers use their extensive data, analysis and domain expertise and support the transformation from PowerPoint to digital channels and make optimal use of the new possibilities available, the democratization of data will succeed. Even more, they will have more time to consult customers based on profound analysis and support executives in implementing actions.

What does all these mean in practice?

If we can all agree that data needs to be presented and shared in the appropriate way for each audience, what does that mean for MR agencies in real life? Well, the good news is that it's easier now than it would have been several years ago. There have been huge strides in automation which make the approach cost-effective and profitable.

If decision makers are using the insight we deliver "live," one challenge we need to remember is that this means they are digging into it without guidance and may misinterpret it. As analytics professionals, we need to think carefully about every use case. This means we need to use design thinking, which focuses on the user of the data.

To better understand design thinking, picture a classic roadmap. It contains all possible information about an entire region. Such a map is like a classic PowerPoint deck that visualizes all data available. But do you really need all this information to reach your next destination? Don't you just want to know whether you have to turn left or right at the next intersection? Don't you instead need a navigation system telling you where you are and how to best reach your goal?

This is design thinking – considering what your user needs from the data visualization at any time, in any situation. You need to look through the eyes of your customers. You have to carefully examine the key activities, challenges and management tasks of the target group for which the visualization is intended. Good visualization does only one thing – it gets to the point and makes it clear to the viewer what needs to be done, no more and no less!

A stable future

Great data visualization is a huge opportunity for MR agencies. Ultimately, the more we can ensure that clients derive value from the research we provide, the more successful they will become – and the more successful their research provider becomes. Agencies can create a stickiness that ensures their clients keep coming back for more. It's a true opportunity to develop the sort of partnership that delivers long-term business relationships and a more stable future.

The other great opportunity for researchers is the ability to build new value propositions that use automation – including automated data visualization. Productivity remains core to an agency's success and the ability to create a wide range of different data visualizations from the same data set is valuable. Harnessing technology to do the heavy lifting allows your most valuable asset – your people – to focus on the value-adds, based on that design-thinking approach.

The rising tide of data is not going to go away. Researchers have a unique opportunity to turn that tsunami of information into genuine business value.

www.confirmit.com

QUIRK'S OUTLOOK 2021 RESPONDENT RECRUITING

Recruiting in 2021: Current challenges and the year ahead

Recruiting over the course of the past year has required all parties to shift gears. Quirk's spoke with Murray Hill National to learn how they've managed the challenges.

SUSAN OWENS
President and Owner, Murray Hill National

With 2020 in the rearview mirror, businesses and consumers alike are still grappling with the effects of the past year and trying to understand what 2021 might have in store. To better understand the state of recruiting in 2021, Quirk's spoke with Susan Owens in November 2020 to learn how Murray Hill National rose to the challenges presented by the past year and how they continued to ensure quality recruiting despite the unpredictability that 2020 offered.

What are the challenges right now with recruiting?

Right now, everything is pretty much online and we're not doing a lot of in-facility work. At first the online work was more challenging but it's become easier as the technology piece has clicked for respondents – they're more used to the Zoom meetings so now it's a matter of getting them to connect and remember to be on the same device, as well as trying to get them to dress properly and occupy their kids and pets while they're participating. Toward the beginning of the pandemic, the real challenge was just the transition of the technology piece and now it's more just helping respondents maintain the right environment during the research.

One silver lining within this mess is that we were able to transition so quickly and shift gears so fast. Plus, our whole team – all the recruiters, the project managers, everyone – we've really become experts in this new mode of working and recruiting.

Is there anything in particular that's been helpful in terms of helping respondents adapt?

We make sure to connect with respondents early on and have a recruiter go over the details with them during the initial recruitment. Afterwards, we'll follow up with a detailed confirmation letter. Finally, we'll call respondents before their session. For in-facility work, we always made a call 24 hours beforehand, but with online work we're calling an hour before. So we've shifted our practices there and this has helped.

Do you see these adaptations as being useful as well as permanent in the long term?

Coming from the qual world, it can be a bit disappointing when we have all these facilities available and we're used to doing in-facility work. But the bottom line is that this new mode of work isn't going away. Prior to the pandemic, we would see some in-facility work followed by telephone interviews, and though telephone interviews are likely going to become obsolete eventually, we'll still keep these for certain projects. For example, we're currently running a project with kidney disease patients and while it's nice to have respondents be tech-savvy and using webcams, this isn't necessarily feasible when people are so sick, so we're defaulting to standard telephone interviews because that is what is comfortable and easy to use for the respondents. I don't think the video is ever going to go away. It's a wonderful way to conduct face-to-face and we can invite the clients through videostreaming for convenience. Still, I have had a lot of moderators say that it's not the same as in-person work and there's still the issue of usability and touch and feel. So, the in-facility work will come back but I have a feeling it's going to be slim in comparison to what it was.

What has changed with the respondents themselves in terms of show rates, enthusiasm and the general respondent experience?

Respondents have been very easy to work with. At the onset of the pandemic, respondents were much easier to reach due to the number of people not at work and they were more interested in the research as well. Show rates have been great, with both online research and in-facility work. We also haven't experienced many people saying that they just won't do the research. Show rates are still holding steady, but as people have gone back to work and school, we've had to be more restricted with timing to work around their schedules, whereas early on we could have morning and afternoon groups without conflict.

Overall, the respondent experience hasn't changed in terms of our work. We're offering incentives as if they were coming to the facility, so once facility work has picked up speed again incentive amounts will likely increase for in-person. The real change has been in how we execute or host the research.

Once the pandemic has passed, do you see any additional challenges for recruiting?

Once we get back to more in-facility work, our main concern will be with how we execute everything. We're still going to have to be careful to make sure everything is clean and sanitized and that proper social distancing is happening. We just don't know how the pandemic will continue to play out and even after we're headed in a positive direction we're all still going to be in the mental mode of needing to be careful and protecting ourselves. As we conduct more in-person work, there are going to be cancellations as people navigate their own comfort and safety with uncertain times. But no, I don't see long-term challenges for recruiting post-pandemic. Even with the in-facility work that we've done so far, we've had 100% show rates among patient, consumer and health care sectors.

Where do you see the need for recruiting right now?

All sectors are fairly busy – consumer, B2B and health care. There was a dip for a few months in May, June and into July, where the numbers were down. However, we were still transitioning our workflow, so as the rates picked up again we'd already learned the process for recruiting during this time and how to guide respondents through it, meaning we were prepared to handle the increase in work later on.

Along with old and new challenges, how does Murray Hill ensure quality?

We have a specific process that we follow and our project managers know to not deviate from that process. The process doesn't change no matter what kind of research we're doing – it stays the same to make it valid. So, when we get a new project, a project manager prepares and trains the recruiters. We also program a prequalification survey to send to respondents. As an example, let's say we're looking for moms with babies in Size 3 diapers. We'll pull from our database of moms with kids in a certain age category and then we'll reach out via e-mail with a few short questions. Once we get those results, our recruiters first call those people who we think might be really qualified. On the back end, we'll have another set of respondents that are already on the phone. Let's say we don't have their e-mail address or we don't know if they have kids but they're 25 years old and married, so we'll reach out to these people as well. We get a pen-and-paper screener on them and that goes back to the project manager from the recruiter. Once we've ensured accuracy and quality, a confirmation letter is sent to the respondents immediately. It's important that we contact respondents right away so they don't experience a gap in communication, so within 24-36 hours we'll send a confirmation letter out. We then update the client so they can see who we've recruited. As we're nearing the time for the study, the project manager rescreens the respondents to make sure the recruiter did a good job and that the respondents have not changed their answers. And then we'll make a reminder call to the respondent – an hour before if it's a video interview and 24 hours before if they're coming to the facility for in-person. So, we follow a strict process with everything we do; this includes phone-to-web work like CATI/CAPI/PAPI and old-fashioned CATI work.

What sets Murray Hill National apart from other recruiters?

First and foremost – we're national. Our vice presidents, project team and recruiters are highly experienced and have a lot of longevity with the company. We follow a strict process and, in order to ensure quality results, we don't deviate from it. As the pandemic has highlighted, we have the ability to shift work from the office to at-home quickly so that regardless of the circumstances we can stay on track. Additionally, we can recruit all audiences such as consumers, B2B and health care, including patients. These qualities combined set us apart from other recruiters.

The core of this business is recruiting – all methodologies and all audience types. At Murray Hill, something that we've become experts at is product placement. For this work, the client sends the product to our offices and we have an assembly line where we package the product and send it back out. If there's a need for us to get the unused or used product back, we include a self-addressed box with the product when we ship it out and then the participants can return it to us. We can handle all facets of the process for clients – we screen and qualify the participants and we also take care of the shipping and return of the product.

www.murrayhillnational.com

QUIRK'S OUTLOOK 2021 EYE TRACKING

informed decisions GROUP

Procedural advances in mobile eye-tracking

A look at the methods and metrics that can lead to optimized retail product placements

BY SUSAN JOHNSTON
GM and SVP, Business Development, Informed Decisions Group Inc.

Informed Decisions Group Inc. (IDG) is a full-service behavioral insights firm focusing on shopper insights and consumer science. We specialize in measuring the impact of changes in branding, communications, design, assortment and organization on shopper behavior.

By leveraging eye-tracking with other behavioral methods, our shopper research has innovated areas from package design to planogram (POG) optimization and in-store communications. Recognized as a top company for in-store research by Quirk's in 2020, we also rely on our proprietary virtual aisle technology when in-store approaches are not feasible. Our flagship offerings include:

- Mobile and stationary eye-tracking
- Biometrics including micro-expression coding and galvanic skin response
- Retail ethnography
- Customer intercepts
- In-person life-sized and online virtual aisles
- Market segmentation and targeting
- Conjoint and market simulation modeling

Being among the first market research companies that began leveraging mobile eye-tracking (MET) for shopper research, our behavioral science team has developed ways of analyzing and interpreting gaze data that differs from traditional procedures. This enables clients to gain a better understanding of how visual changes impact shopper behavior at the shelf.

MET has come a long way since the cumbersome glasses, hats and backpacks that required a long calibration process. Additionally, the software available in MET's infancy made analyzing a large number of products on the shelf nearly impossible. Throughout the years of executing MET projects and addressing the innovative needs of clients, IDG has focused on developing analytical procedures to confidently generate insights for entire shelves to entire retailers.

One procedural advancement with mapping and analyzing MET data from shopper research is to code for every product on the shelf, giving the client a real-life expectation of their new planogram or package's performance. A common practice has been to map data just for the package being tested or a specific brand's SKUs in a new POG. But this assumes a unidimensional approach which assumes a change to the shelf only impacts shopper behavior for one product or specific products being tested, when in fact any change to a shelf can impact shopper behavior

for many products.

Taking from the idea to include every product on the shelf for mapping and analysis, the following three metrics have proven to be crucial in best understanding how changes impact an entire shelf.

- **Share of engagement** – The primary metric to use when examining an area of interest's performance.
  - This considers the total engagement, in seconds, attracted by all products on the shelf, similar to a market share metric. The higher the share, the more attention the SKU is attracting from other SKUs on the shelf.

- **Percent noticed –** Measure of initial "breakthrough"
    - This shows the average percent of shoppers who noticed each SKU on the shelf. While some SKUs may have a strong breakthrough, they can still have low share of attention due to shoppers not being engaged with the SKU.

- **Engagement –** Shows the ability of a SKU to retain attention once attracted.
    - This measures on average, in seconds, how much time each SKU was able to attract from the shoppers.
    - The longer a shopper looks at a SKU, the higher the probability of them buying it. Generating one additional second of engagement can increase odds of purchase from 43% to 550%, depending on the brand. (Espin and Valdiserri, Quirk's Marketing Research Review, December 2013).

Further advances in the use of eye-tracking data have led to segmentation analysis of gaze data to generate shopper segments based on how they shop a shelf. The more obvious types of eye-tracking-based segmentation include the aforementioned fixation metrics but time-to-first-fixation can also be used to generate segment-specific scan paths to better understand how subgroups of shoppers navigate the shelf.

Case study POG optimization

When a new client decided they wanted to optimize their product placement to help their brand as well as increase sales for the overall category, they partnered with a national retailer to test varying aisle orchestrations virtually and forecast sales to narrow down the final organizations to be tested using a mock in-store setting at a retail lab.

All of the forecasts showed an increase in sales for the client's brand given the finalized product placement.

For the final test and confirmation, they partnered with a retail lab and IDG for mobile eye-tracking to completely understand how this new POG would affect shoppers' behavior. While pre-recruited participants shopped, their visual attention was quantitatively measured in the aisle.

The eye-tracking data confirmed that the new POG did, in fact, attract more attention to the client's SKUs, which would yield increased sales. IDG also measured the competitor brands and found that while this new POG would increase sales for the client brand, it was also attracting even more attention for two of their primary competitors. So, while the client would experience a lift in sales, they would experience a decrease in share due to their competition experiencing a bigger lift in sales. Where other eye-tracking results would have claimed the new POG a winner, they would have inadvertently misdirected their client into a scenario of decreased share. IDG's Share of Attention feature caught this before being it was implemented and was able to create a better POG optimization.

As eye-tracking technology and analysis have significantly advanced over the past decade, the immediate future of in-store applications appears to be hindered due to retailer permissions from COVID-19 reactions and restrictions. While this can present a challenge to shopper research especially with regards to in-context eye-tracking, innovations exist (and will most likely advance quickly) that can allow eye-tracking in real-world environments.

Virtual methodologies including VR headsets and life-sized virtual aisles enable clients to continue with in-context shopper research for behavioral insights at the shelf. Both options incorporate eye-tracking and can replicate the in-store experience with surprising realism. Beyond eye-tracking, these virtual methodologies allow the collection of basket metrics and provide seamless integration of retail ethnography, post-shop surveys and qualitative shop-alongs. More advanced experimental designs can incorporate volumetric conjoint analysis and simulation/forecast modeling.

www.idg-consulting.com

QUIRK'S OUTLOOK 2021

AUTOMATED RESEARCH

Implementing agile new product development solutions

Supporting agile new product development requires a seismic shift to agile, automated solutions

BY SUSAN VIDLER
Managing Director, Harris Interactive U.K.

To coincide with the launch of Toluna Start – the industry's first and only end-to-end real-time consumer insights platform – we assembled leading consumer insights professionals from major brands like Facebook, CVS, eBay, Colgate-Palmolive and many more over the course of three days to share their critical business needs in the areas of new product development, collaboration and brand and communications research.

Consumers have changed this year. But getting a handle on what your target audience wanted and needed a few months ago is not enough to make safe assumptions for new product development today.

Why? Because they're constantly changing in the face of unprecedented circumstances. And product launch success depends on your ability to keep up. During the first session of Toluna's Digital Launch Event, we spoke with a panel of insights leaders from brands around the globe. If we could all agree on one thing, it is how crucial agile insights are to making quick decisions to move businesses forward.

- "Some people are saying two weeks is agile and that's not for me – 12 to 24 hours is agile."
- "…old methodologies are not able to answer today's business questions. The shock of the year demanded this of us…to ask different business questions and create the space for agile solutions."
- "We like to share research results with a very large distribution list. Through COVID-19 we were running our tracker to review consumer shopping habits and could feed that straight into our forecasting models two to three times a week and the ability to feed that insight into the business in real time was critical to business planning."

The pressure is on for organizations worldwide, fueling the need for efficiencies at every stage of the process to drive quality insights at pace.

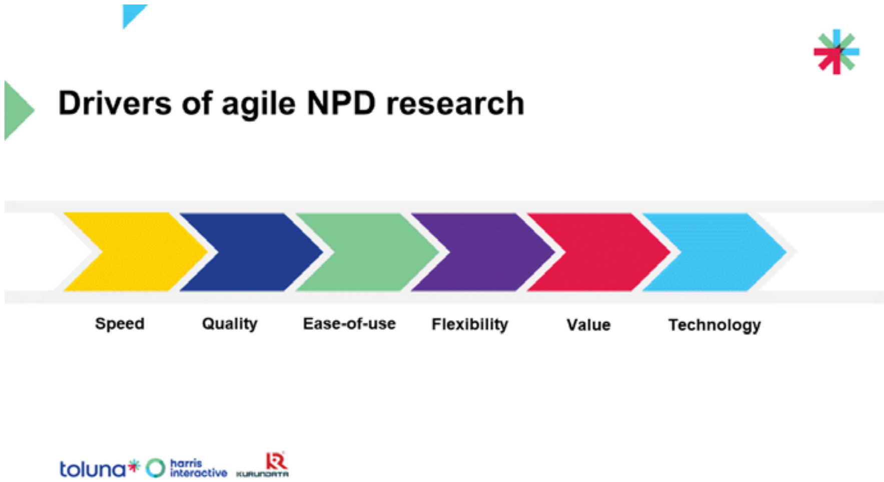
What we're seeing is that breaking down silos while putting automation and technology to work for you helps insights professionals meet the need for speed, quality, ease of use, flexibility and value – all at the same time. In light of today's changed workplace and new demands, collaboration goes beyond working with your own team more efficiently to other teams and functions within the organization to answer business questions more effectively.

Why is agile new product development so important?

During the new product development cycle, critical stops are required to ensure quality decisions are made.

- Identifying needs

- Idea screening
- Concept testing
- Product optimization
- Product testing
- Post-launch



The majority of new product launches fail (you read that right)

If you believe in a product and see NPD through, it's hard to imagine your new offering failing. It happens when companies mistakenly believe they inherently understand their audience's needs, preferences and behaviors.

Inferences or outdated facts are setups for failure. It's frustrating, costly and time-consuming. During a year of so much uncertainty, launching a new product without thorough research could be detrimental.

So, what concept will resonate best? Which claims can increase uptake? It takes up-to-date, meaningful data to answer these questions and more.

Here's why putting data on your side is more important than ever

COVID-19 has been and continues to be a driver of change. Our personal and professional lives are in flux and so are consumers' patterns and preferences. Globally, consumers expect to spend more on products and services such as household cleaning, personal care, health care and beyond. Conversely, consumers are cutting back in areas as there is a great deal of economic uncertainty and people are consuming products and services in different ways now.

Being able to adapt quickly has also proven critical for brands over the last few months. There's power in real-world examples so here's how clients use insights to make key NPD decisions, fast:

- Household cleaning providers are testing new claims on existing products to ensure they resonate.
- Beauty brands are following trends for in-home treatments.
- Gaming companies are testing new products to meet the increased, at-home demand.
- Subscription service providers are testing new content as demand increases.
- There's also a need for more effective communication around safety measures in many categories. Finding the right balance boosts consumer confidence.

But previous NPD challenges still exist

Yes, this year has presented business with an unmatched need for agility. But NPD hurdles have always existed – and still do. Here are challenges clients often meet across the board and how we answer them.

- **Speed:** In NPD, it's almost always crunch time. Templated questionnaires are a major time-saver. One client recently tested more than 100 ideas overnight across two markets as part of an agile sprint.
- **Quality:** Thanks to technology, there's no need to sacrifice quality for the sake of time. Technology has enabled best-practice methodology to be embedded into the solutions.
- **Ease of use:** Again, thanks to intuitive, user-friendly tech, brands are free to spend more time on the project and less time navigating cumbersome interfaces to access data.
- **Flexibility:** NPD is not a one-size-fits-all process and neither are our solutions. From additional questions to monadic or sequential monadic design and beyond, flexibility is a built-in service.
- **Value for money:** Businesses are always expected to do more with less and that's something we inherently understand. Automation helps control costs, empower businesses and solve business needs with consistency.
- **Technology:** Cutting-edge tech powers the products and solutions that connect brands with invaluable consumer insights. Like consumer needs, it's always evolving and being optimized.

At one point, a key speaker mentioned that we've seen three years of change happen over the course of three months. The pandemic has accelerated changing consumer needs and behaviors. What a target audience wanted a month ago may be totally different from what they expect today. That means fewer assumptions and more insights are needed to drive organizations forward.

The need to bring new products to market quicker remains but as the speed of consumer change continues to evolve, agility is more necessary than ever.

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QUIRK'S OUTLOOK 2021 ADVERTISING RESEARCH

Decision Analyst
strategic research ■ analytics ■ modeling ■ optimization

Waning brand awareness in COVID America

Shifting consumer behavior and attention has challenged traditional methods for brand and advertising awareness, reinforcing the need for testing and tracking ad effectiveness

BY JERRY W. THOMAS
President and CEO, Decision Analyst

Among the few brands that track advertising and brand awareness in today's shoot-from-the-hip marketing world, many companies are seeing declines in brand and advertising awareness as the COVID-19 pandemic disrupts normal patterns of human behavior. Let's explore some of the possible explanations for falling brand awareness, although these will vary by market segment and product category.

Retail behavior

Traditional brick-and-mortar retailers, for the most part, have experienced huge declines in foot traffic. Walking down the store aisles, consumers see an array of products, packages and brands. Visits to retail stores tend to help maintain and reinforce brand awareness across a wide array of brands, even those that are not purchased. Traversing a store aisle is analogous to driving on a superhighway and viewing billboards along the roadway. We don't normally think of visiting retail stores as exposure to advertising but those packages on the shelves are little billboards advertising the different brands.

Some might argue that shopping online makes up for the lower levels of retail store visits. It does to some degree but online search functions allow you to see only what you want to see – and that means exposure to fewer brands. Also, if the online purchases are repetitive (say, for groceries), you might use past purchases as a guide to the next cycle of purchases – again limiting the number of different brands you will see.

Travel behavior

COVID-related reductions in commuting and driving times have reduced consumers' exposure to outdoor billboards and signage as well as roadside retail establishments.
It's obvious that brand awareness created by outdoor advertising would be negatively affected by reduced commuting and car driving. What might be less obvious is the downward pressure on retail store awareness. Retail sites along major highways are chosen partly for their advertising value. Highly visible retail sites tend to build and maintain store awareness. Lower levels of traffic reduce the advertising effect of these sites. So, reduced travel reduces awareness of restaurant brands, gasoline brands, food stores and most other retailers.

Media behavior

More time at home during the pandemic is leading to more time in front of the television and more time online. TV viewership is higher than it was before the coronavirus arrived,

at least among those who can work effectively from home. The one-third to one-half of the population that work in the social-interaction portion of the economy (entertainment, travel, churches, restaurants, hospitals, etc.) or work in construction or factories are likely consuming media as they were before COVID-19. Online activity (not work-related) is likewise up since the start of the pandemic. So it's likely that TV advertising and digital advertising are as effective – or perhaps more effective – as a result of millions of people working from home. The one counterpoint is the rapid growth of prerecorded shows and streaming of shows and movies, where TV commercials do not appear.

However, a massive shift of advertising dollars from traditional media (especially TV) into social media and online advertising over the past decade has in many instances led to reductions in brand awareness. The primary reasons: television is still the highest-impact media for most product/service categories and social media and other digital advertising tends to achieve high frequency but low reach (that is, digital often reaches fewer people).

Political spending

2020 was a very atypical year, as political spending on media advertising moved upward along with the number of COVID-19 cases. High levels of media spending (offline and online) on the presidential campaign, senate races, house races and state and local contests crowded out some of the normal brand awareness-type advertising. So the political campaigns reduced "share of mind" devoted to brands and eroded brand awareness across many product categories. Presidential elections only come along every four years, so the dilution effects of political advertising should diminish as we move through the first quarter of 2021.

Advertising effectiveness

The effectiveness of television commercials has declined over the past 20 years or so as major corporations have cut research budgets and the ad testing they fund. Advertising that relies on vetting via the "creative judgment" of marketing and advertising executives, rather than testing among consumers, leads to less effective advertising. These executives tend to have biases and hidden agendas (don't we all have these weaknesses?) and possess too much industry, category and technical knowledge to be representative of the target consumer. Consistent testing of commercials and ads among the target audience can identify highly effective campaigns and executions and help companies and agencies improve the impact of all commercials and ads over time.

Digital ads suffer from the same "creative judgment" weaknesses but even more so. The cost to produce digital ads tends to be low compared to traditional TV commercials, so a smaller share of digital ads goes through any type of independent, objective research testing. The combination of shifting advertising dollars away from television to digital, combined with the lower effectiveness of digital ads, is contributing to the declining awareness numbers that many brands are experiencing.

There are a number of good advertising testing systems available from solid, reputable companies. The secret to success is choosing a system and sticking with it, so that you and your agency learn how to use and interpret the results from the system. It takes time to build up norms for your brand and your category and learn how to analyze the results from the advertising tests. To be successful, it's important to set up standards so that every new ad or commercial is tested in exactly the same way, among exactly the same type of sample, using exactly the same system. It's also important that all commercials be tested at the same level of finish. Rough executions yield different scores compared to finished commercials. Lastly, no one question can measure ad effectiveness. The scores from different types of questions must be modeled to yield an overall advertising effectiveness measure.

Swallowing pride

While the impact of declining awareness attributable to COVID-19 might fade away as vaccines become available, there are no vaccines for bad advertising and bad advertising doesn't seem to produce any antibodies in creative minds. The only solution is consistent ad testing, swallowing one's pride, accepting the results and learning from them. Hopefully, 2021 sees the arrival of low-cost, highly effective vaccines for COVID-19 and the return to something close to normal social behavior will uplift brand awareness across many product categories.

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QUIRK'S OUTLOOK 2021

SAMPLING ON SOCIAL NETWORKS

potloc

The future of research is social

With 3.96 billion people using social media today, sampling on social channels is the next research frontier

BY RODOLPHE BARRERE
Co-Founder and CEO, Potloc

According to Hootsuite's latest Digital Statshot Report, more than half of the world's population is now on social media. Not ever in human history have we had such vast access to information, people, news and interconnectivity. The implications of this are numerous in terms of human communication, how people interact with brands and businesses worldwide and how companies extract consumers' insights.

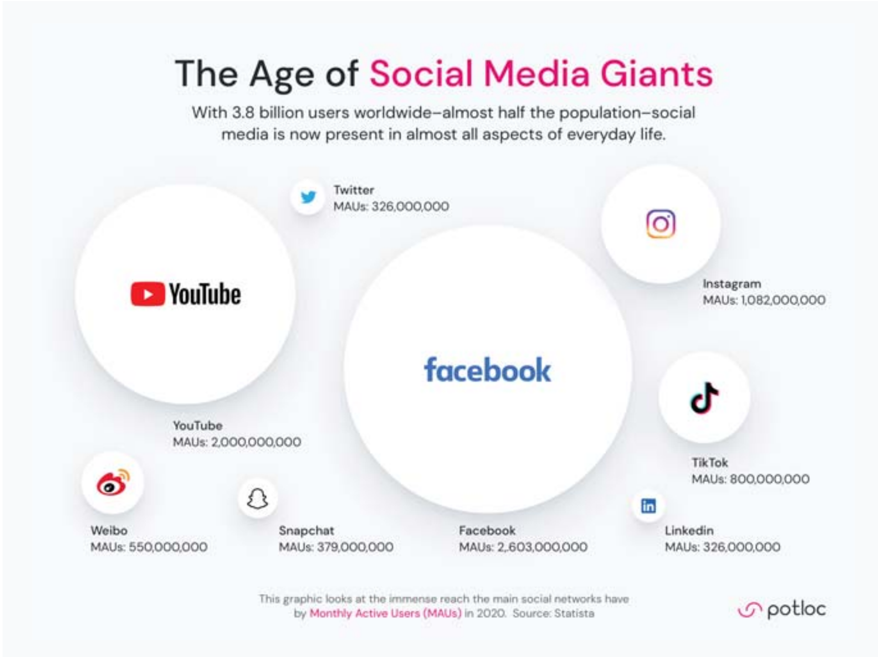
When I started building Potloc in 2014, I recognized the power social media had to gather people's thoughts about what was going on in their immediate vicinity. We helped local businesses identify what offering, location and combination of customer experiences would appeal to their trade area. It didn't take us long to realize we were sitting on a real gold mine of insights. The samples we were getting through social channels were on point, with relevant respondents answering our surveys with no other incentive than their desire to be part of the conversation. Through testing and trying different approaches, we soon discovered that we could leverage the targeting capabilities social platforms offer to reach any person with a social account, anywhere in the world. This realization allowed us to scale our operation and offer our services anywhere you could find someone "thumbing-up" through their social feed. This approach might seem obvious but the reality is that sampling in social media as a methodology has been largely overlooked as a great way to reach niche audiences and fresh respondents on a global scale.

The medium is the message

The key to nailing social sampling boils down to really understanding the medium. Social channels' dynamics are quite different from those of very controlled environments like focus groups, online panels or even face-to-face interviews. To gain insights from social users, you need to understand how the social ecosystem works: people use social media mostly when they have downtime – moments of free time they dedicate to browsing their feeds, a golden opportunity to interact with them. On average, the world's internet users spend two hours and 24 minutes using social networks across all devices each day, accounting for more than one-third of our total internet time. "Intercepting" them during this time increases their chances of taking a survey and focusing on expressing their opinions. Non-intrusive research and how companies approach potential respondents also plays an essential role in conducting successful sampling. The messaging not only needs to be appealing to them but also relevant and at the right time. After more than seven years of developing our expertise in social media sampling and the technology that enables it, we know how to increase the relevancy factor. Here are my thoughts:

Location, location, location

Social media is the perfect place to reach respondents, no matter the incidence rate or the quotas you have set. The beauty of targeting people via social networks is that you can reach them at a broad location level (country, state, zip code), down to a half-mile radius. Through geotargeting or more conventional location-based targeting, businesses can reach highly relevant audiences. People who live, work, study or just transit through the targeted area are real-life respondents that have a treasure trove of insights to share, from in-store CX to people's experience attending an event or having seen a particular billboard at a specific location. The possibilities are endless.



The right targeting can get you niche audiences with low incidence rates

Again, the nature of social networks is that people are there to share. Think about it – when you browse through your feed on any of these networks, you are already interacting with brands and businesses to a certain degree. This gives researchers unprecedented opportunities to access the largest consumer group globally and extract insights directly from them. The essential advantage here is the ability to target a specific population, not only by geographical area, as I mentioned before, but also by age, gender, interests, language, profession, income, etc. We've worked for the largest consulting firms globally, like Bain & Company, BCG and EY, to help them reach very niche and specific audiences for their clients, where panels tend to struggle. Hitting the bull's-eye with targeting on social guarantees a more representative, diverse and genuine sample of the broader population, with fresh respondents that reflect real people living in the real world.

The biases to keep in mind

Just like any other methodology, we deal with some biases that come with social sampling. We have identified four of these as well as ways to tackle them:

1. **Coverage bias:** For targeting consumers on social networks, they need to meet certain conditions. They must have access to the internet, have a social media account and be active users. This might show an under-representation of men and older people. However, older generations like Baby Boomers and the Silent Generation have adopted social platforms in great numbers. In the U.S. alone, 72% of Americans between the ages of 50 and 64 are on Facebook and 62% of "online seniors" aged above 65 are also there.
2. **Ad platforms' algorithm bias:** Taking Facebook as an example, its advertising algorithm is set up to minimize cost-per-click. This means it pushes survey ads primarily to the least-expensive audiences (under-representing the population). Setting up quotas to balance the sample becomes essential to counter this bias, especially when it comes to more expensive-to-reach people, like men and the elderly.
3. **Cognitive load bias:** Answering an online survey is demanding from a cognitive standpoint, so some people might find the task too difficult to complete, which gets exacerbated by the use of mobile devices. This might result in an under-representation of older people, less-educated or illiterate people or people of a low socioeconomic status.
4. **Self-selection bias:** Unlike web panels, with social sampling we have to communicate on the survey subject. People who click on our ads are more inclined to provide answers about a specific topic. As we rarely offer any incentives to respondents, people who complete our surveys do it because it matters to them that their voice is heard. In my opinion, today it's hard to say what is the lesser evil: having respondents naturally interested in the subject or respondents seeking incentives.

Reaching the unreachable

As we witness a new world order emerge as a consequence of the COVID-19 pandemic, surveying people now comes with a set of limitations. Social distance and lockdowns are a no-go scenario for in-person or intercept interviews. People are spending more time than ever online and at home and a third of that time on social media. Again, social sampling here presents itself as a unique opportunity to reach people in impossible places and situations under these circumstances. At Potloc, we launched twin studies in Canada and France about what frontline health workers saw in the trenches against the virus. We reached them in emergency rooms, hospitals, nursing homes and places no one else could enter, at a time where it seemed impossible to get their insights – and with great success. Niche and low-incidence populations are out there, browsing their social media feeds. We just need to find them and offer them the chance to express their opinions.

Interested in learning more about social sampling and how we run respondent acquisition at Potloc? Check out our public studies at potloc.com/resources or better yet, e-mail us today to schedule a discussion with one of our research experts: hello@potloc.com.

www.potloc.com
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QUIRK'S OUTLOOK 2021 B2B RESEARCH

iResearch™ research to relationships

Business to business: A human-to-human approach for creative connection

In a digitally transforming and shifting world, marketers must dig deep to truly understand their B2B buyers

BY YOGESH SHAH
CEO, iResearch Services

Insight into human understanding, interaction and engagement

It's not as simple as just B2B and B2C anymore. Digital transformation and COVID-19 have changed the way people live and work – and this needs to be recognized in the way companies communicate with and engage clients and potential customers. Especially in times of uncertainty, the ability to see people as human beings and reflect that in insight and interaction is crucial.

The need for agility and innovation across all areas of the business, led by senior management, means that everyone needs to be aligned to the customer's needs and wants and be shaping strategic direction around them. It's not enough for marketing, sales or specific individuals to be the only ones in the know about existing and potential customers – that knowledge, understanding and insight needs to come from the top.

B2B marketers need to see bigger picture and in-depth business drivers

It's critical to success to know and understand the issues clients and potential clients face each day and be able to offer practical support and guidance. To get under the skin of their challenges and opportunities – not just in their working lives but taking into consideration their whole lifestyle. Increasingly the two are merging; it's not just about work-life balance anymore.

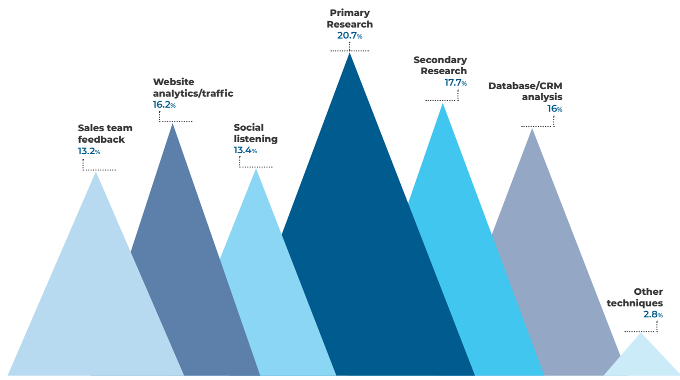
Marketers and salespeople need to get to grips with their client's business sector, their company and the roles they play within those organizations – the challenges and opportunities they face at each level. They can then suggest solutions to issues that arise frequently or are likely to in the future. The most effective way to do this is by conducting targeted research to take the temperature of clients' and potential clients' industries, job roles or themes, identify specific challenges and opportunities and test hypotheses with the people at the heart of that sector.

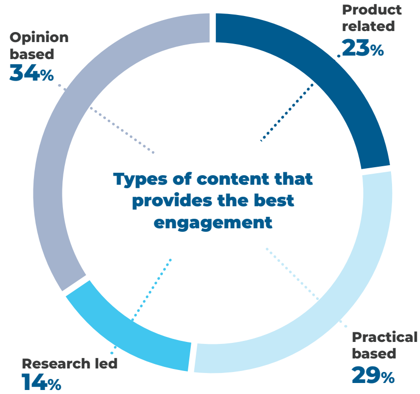
B2B research is the most effective and in-depth way for clients to get close to customers as well as get under their skin. Ask questions, get their perspectives, find their pressure and pain points. How do you provide genuine solutions to their problems and questions and make their life easier? Jeb Blatt of brand agency Jack Morton believes B2B marketers are wasting 95% of their resources on B2B marketing in a personal world[1]: "Even B2B buyers want to feel something." That statement rings true now more than ever.

Thought leadership – creating insight-driven content

Industry-, sector- and role-specific insights from customers and their peers are crucial in testing hypotheses and forming meaningful viewpoints. Having clear perspectives on a hot topic or industry sector sets the scene for thought leadership. When this is

Techniques used by marketers to research target audience.





insight-led, it's a powerful tool to appeal to target audiences and showcase business knowledge.

In a recent survey of CMOs and senior marketers by iResearch[2], one-third of participants believe opinion-based content provides the best engagement and almost three-quarters (71%) believe thought leadership provides the best results for sentiment and relationship-building. Sixty-one percent of marketers surveyed believe that issues-led content that shows an understanding of the audience's business or industry challenges receives higher engagement. Unsurprisingly, primary and secondary research came out on top as methods of researching their target audiences.

This opinion of the power of thought leadership is not limited to marketing. A study by LinkedIn and Edelman[3] found that 88% of decision makers agree thought leadership is effective at enhancing their perceptions of an organization. Forty-seven percent of C-suite executives say they shared contact information after reading thought leadership content.

B2B research vital to shape views and strategies

How can you create valuable content if you haven't researched the topic in any depth or if you are unable to demonstrate perspectives and points of view from within that industry? The iResearch survey suggests CMOs still find opinion-led research most valuable in engaging clients and allocate the biggest budgets to content marketing efforts. But content marketing must be meaningful to resonate with today's B2B audience. To make an impact, you need the ability to tell truthful stories in an engaging way, all backed up by accessible evidence.

Clients need the right insight from carefully segmented data. B2B research techniques and methodologies are vital for clients to really get to know their client base and prospects by understanding their motivation and behaviors. The more tailored and targeted the better – avoid one-size-fits-all approaches and aggregation[4] and segment the data to paint an accurate picture of what's important to the customer and how they prefer to engage. This then informs thought leadership and content marketing strategies that can engage with clients on a deeper level, by sector, theme or specific issue.

Pandemic and political change require pivoting with purpose

Changing times mean evolving behaviors and ways of working. The way people consume content is no exception, with more CMOs of B2B businesses utilizing content marketing (23%) as opposed to investing in event marketing (11%), as the focus shifts to virtual events and online content.[5] A recent study from B2B technology body Finite found marketers have been unable to keep up with content demand during the coronavirus pandemic. They've struggled to measure return on investment, as well, which is crucial to B2B marketing success.[6]

Thinking like a CEO with a questioning mind-set and a forward-looking approach – as well as learning from the past – offers a bigger picture strategy.[7] Consider wider industry and business issues and opportunities. What thinking and innovation does this inspire? We should all keep learning through quality research – both qualitative and quantitative – and continue to learn from clients, colleagues, competitors and peers. It's those well-rounded, carefully scoped insights that shape success.

www.iresearchservices.com
sales@iresearchservices.com
44-20-3965-6776

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QUIRK'S OUTLOOK 2021

DATA COLLECTION AND FIELDING

innovate MR Faster Answers

Successful strategies for B2B research and fraud mitigation

An overview of best practices in survey design, sample quality and red herring research

BY MOLLY STRAWN
Senior Marketing Strategist, InnovateMR

Throughout the market research and survey fielding process, it is essential to keep in mind respondent data quality from start to finish. This year, Cybersecurity Ventures anticipates $6 trillion in damages as fraud methodologies have become more advanced and more sophisticated. Acknowledging that these dangers exist is vital to position research for success.

To tackle this challenge, Lisa Wilding-Brown from InnovateMR, Hilary DeCamp from the LRW Group and John Voda from AT&T joined forces to educate the industry about top data quality methodologies. Their holistic insights cover design, sampling and data analysis.

"No one is impervious. Cyber fraud poses a very real and material threat to companies large and small," says Lisa Wilding-Brown, chief research officer at InnovateMR.

How fraudsters do it

Just as data quality measures are continuing to evolve, so are the means by which nefarious fraudsters exploit weaknesses to pilfer survey incentives. Today, these individuals are capitalizing on technological prowess such as:

- **Advanced bots –** Bots today are able to bypass basic red herring questions through advanced AI that makes them more convincingly human. Since these types of bots act as real survey participants, basic length of interview (LOI) parameters and other standard quality checks can't catch them.
- **Click farms –** Fraudsters now use thousands of devices simultaneously, cashing in on survey rewards at scale. These new tricks are making standard device fingerprinting and IP authentication checks obsolete, as each device has a unique SIM card and spoofed IP address.

From the researcher's perspective

John Voda, senior market research and analysis manager at AT&T, touts the importance of ensuring that every interview is vetted as a quality respondent.

Voda was once involved with a medical market research study many years ago. In that particular case, a doctor's son learned about the study and shared the link online and dozens of high school students took the survey posing as specialty doctors. With very real life-or-death consequences on the line, the burn that Voda felt influenced his dedication to top data quality from then on.

"Not everyone realizes the importance of identity verification," Voda says. "Whether you survey a teenager, an underwater welder or the CEO of an international firm, it is critical that you ensure each respondent is a legitimate, qualified respondent."

Presenting low-quality data to end clients can lead to:

- Poor business decisions that do not accurately help them answer market questions
- Wasteful cost per interview and budget hits
- Refielding requirements
- Improperly weighted data that skews insights
- Lost projects

- Lost clients
- Irreparably jeopardizing a firm's reputation

Allowing bad sample to enter your study can cost a lot down the road. According to Hilary DeCamp, chief research officer at LRW, businesses often choose a cheaper supplier to adhere to a more stringent budget. However, having to clean up the mess before presenting the data can be far costlier. In her experience, she has seen a researcher once remove over 80% of their data due to poor data quality that was not caught earlier.

"It's critical to focus on a quality-first approach; we often feel pressure to use low-cost options due to budget constraints but it's imperative to ask questions around sourcing and understand the various security and methodological layers in place," DeCamp says.

What researchers can do

When it comes to B2B sample, the stakes are exceptionally high as this segment is frequently targeted due to the high incentives typically offered in this line of research. According to Voda, there are six questions you should ask your sample provider when looking for high-quality B2B sample:

1. How is your B2B panel recruited and vetted?
2. What information is collected from your B2B audience?
3. How is your B2B audience incentivized?
4. What mechanisms are in place to mitigate poor quality?
5. What has been your experience with B2B audiences in the market I am looking to study?
6. Are you Microsoft-certified?

"Don't leave it up to others to handle quality on your behalf. It is dangerous to assume that incoming participants have been appropriately vetted," Voda says. "Ensuring quality requires a partnership between you and your vendors and you should work closely with these companies to have an open and transparent dialog about the tactics employed before, during and after the survey."

Beyond including a layered data quality strategy when choosing a panel partner, the design of the survey itself can impact data quality. Poor study design that includes overwhelming grids, a length of over 30 minutes or leading questions that encourage over-endorsement can all lead to a skew in data.

"While average and maximum break-offs are highest in surveys longer than 30 minutes, poor study design can drive high break-offs in shorter surveys also, so carefully proof each survey to find and eliminate problematic questions," DeCamp says.

One in-survey method commonly used to terminate fraudulent respondents is red herring questions, typically asking respondents to answer a simple knowledge question, perform a simple action or complete a basic mathematical calculation. The problem with these traditional measures is that they are antiquated; new AI-driven bots can portray human-like behavior and can make quick work of these questions. Just like Siri in Apple smartphones, bots can easily answer that the sky is blue, identify the word apple from a list or solve 2+2.

Building in more sophisticated red herring questions that are front-loaded early in a respondent's survey experience is essential for keeping up with new bots. This can include:

- **Asking for industry-specific terminology –** For example, if you are conducting a study targeting cryptocurrency experts, asking which answer most closely matches the definition of blockchain can be an easy way to root out both bots and unqualified respondents early on. It is critical to test and verify domain expertise.
- **Adding fake brands to a recognition list –** Asking respondents to rank familiarity with fictitious brands can easily term bot selections or unengaged respondents. Survey takers should not be selecting that they use a brand that doesn't exist.
- **Unaided and aided awareness questions –** If looking for cloud computing experts, first ask them to list the tools they use via an open-ended question and then compare these responses to an aided awareness question that is captured later in the survey.

"A very basic trap question does not provide a material impact when it comes to invalidation," Wilding-Brown says. In a test fielded in 2020, "A simple question only invalidated 1.4% of respondents and again, we have observed bots answering these types of questions with ease. When asked an optimal red herring question, nearly 22% of the same participants were invalidated across a wide variety of sample sources evaluated."

From the supplier perspective

Panels should always take a layered approach to quality, following a respondent throughout their pre-registration, panel registration, pre-survey and post-survey lifecycles. Relying on self-reported data in a singular timeframe does not work; respondents must be exposed to validation and revalidation checks throughout their entire panel lifespan.

"The key here is to never assume that what people self-report is accurate or true. You must expose respondents to various checks throughout their lifetime in the panel," Wilding-Brown says.

What suppliers can do

Throughout a respondent's ongoing interaction with surveys, layered checks should be put into place at each lifecycle stage:

- **Pre-Registration –** Diverse recruitment campaigns, benchmark quality, attitudinal, behavioral, demographical testing
- **Panel Registration –** Digital fingerprinting, GEO-IP checks, hidden re-CAPTCHA, bot traps, e-mail validation, address/mobile verification, pattern detection, double-opt-in validation, red herrings, open-end analysis
- **Pre-Survey –** Digital fingerprinting, GEO-IP checks, encrypted password and survey URLs, hidden re-CAPTCHA, bot traps, multi-factor authentication, red herrings, open-end analysis
- **Post-Survey –** IP analysis, LOI tracking, address/mobile verification, pattern detection, reward redemption validation, analysis of client feedback, open-end analysis

"Quality does not exist at a singular point of time. Look for suspicious patterns throughout the respondent life cycle and take action quickly by quarantining participants from survey activity," Wilding-Brown says.

At InnovateMR, specifically for verifying open-end responses, our team of research experts have developed a natural language processing tool called the Text Analyzer™, capitalizing on AI technology.

Text Analyzer™ helps to mitigate and remove gibberish answers, copy-and-pasted answers, profanity, duplication, personally identifiable information or other personal information that should not be passed into survey data as well as noncontextual answers that do not directly answer the question asked.

Available in English, Spanish, German and French with more languages to come, this tool pulls from an extensive library of questions served randomly to further validate the content of the respondent answer. In testing conducted last year, results yielded a 24% invalid rate for open-ended questions across the several suppliers tested but InnovateMR's invalid rate was just 8% due to the vigorous quality controls invested by the firm.

"InnovateMR includes this tool in our registration path and panel ecosystem, but clients can also integrate this technology directly into their survey environment or platform via API," Wilding-Brown says. "Clients can also use the tool on a more ad hoc basis via our batch uploader where customers can upload verbatim files to flag poor quality responses."

info@innovatemr.com

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22 TOP PANEL RESEARCH COMPANIES

When seeking respondents for research, companies can benefit from panels through their ability to provide quick and easy access to respondents, even those who belong to niche audiences. Panels also ensure a dedicated group of respondents for your research, decreasing instances of fraud or unengaged responses.

The following companies offer a wide range of panels featuring respondents from niche and broad audiences – from health care specialists and administrators to B2B decision makers to IT – and offering services in numerous countries and languages. If your research needs require the specificity and accessibility of panels, these companies are here to help.

quirks.com/articles/2021/20210167.aspx

Branded Research Inc.

Founded 2012 | 30 employees
Matt Gaffney, CEO

Branded is a leading data and technology company that gathers unique insights to help our clients make more informed marketing and product development decisions. Through proven and innovative methods as well as proprietary technologies like Branded Surveys, Branded Research is able to actively engage with consumers and reach specified target audiences, resulting in more precise and complete end data. Our community is founded on core principles of social engagement and the power of the simple conversa-

tion. It's what sets us apart from the rest. We believe that a relevant, quality conversation elicits a quality response.

Phone 1-888-848-2525
gobranded.com

CatalystMR

Founded 2008
Adam Berman, President

A trusted global panel and market research services leader, CatalystMR's panels are widely recognized for our tens of millions of pre-targeted consumers, B2B and health care professionals across more than 50 countries. With more than 200 profile targets, CatalystMR ensures balanced representative proprietary quality-controlled populations across each panel community. Popular consumer targets include geotargeted moms, teens, high net worth, Hispanics and African Americans, while global B2B targets include SBOs, ITDM, C-level, financial planners and insurance agents. Health care professional targets include physician specialists, nurses and administrators. As a high-touch international market research services leader, CatalystMR provides full-service research and support services including survey design and analysis; a la carte online survey programming and reporting; telephone interviewing field services via a 450-station CATI call center; and custom panel builds including managing long-term private panel communities. Whether you need online panel or online panel with research services, let us earn your business!

Phone 1-800-819-3130 ext. 101
E-mail info@catalystmr.com
www.catalystmr.com

Full Circle Research

Founded 2013 | 16 employees
Adam Weinstein, Co-CEO and Nathan Lynch, Co-CEO

Thrice-named on Inc. 5000's list of Fastest Growing Companies in America (2017, 2019, 2020), Full Circle Research was the first and only U.S.-based, online consumer sample provider to earn ISO 26362 certification, is currently ISO 20252-certified and remains the only company to offer HoNoR (Holistic Next-level Research™). This enhanced survey experience is unprecedented and automated – a marriage of advanced technology, flexible community strategies and industry-leading quality controls that gives business decision makers immediate access to the purest data in the industry. Full Circle's foresight, agility and commitment to innovation translate into a uniquely proactive, consultative experience. To learn more, visit iLoveFullCircle.com.

Phone 1-301-762-1972
iLoveFullCircle.com

Global Survey

Founded 2008 | 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 and corporations.

Phone 91-740322-0322
www.globalsurvey.gs

GMO Research

Founded 2002 | 151 employees
Shinichi Hosokawa, CEO
Christa Arite, U.S. Director
Mariana Dobre, EU Director

GMO Research can offer you an online research solution platform that allows access to one of the largest online panel networks in APAC – Asia Cloud Panel. Asia Cloud Panel consists of over 36 million online panelists across 15 APAC markets ranging from consumers to CEOs. GMO Research is also a part of and backed by GMO Internet Group – one of the largest internet conglomerates in Japan specializing in a number of internet-related technologies including web infrastructure and e-commerce, internet media, internet securities and social media and smartphone platforms. They have the No. 1 Japanese market share in internet security, payment processing, e-commerce solutions, web hosting, domain and FX trading.

Phone U.S. 1-626-720-3952 (LA); 1-516-884-9600 (NY)
gmo-research.com

Holden

Founded 2006 | 50 employees
Jeffrey Kelsch, Managing Partner

With over 15 years' experience conducting research projects around the Asian region, Holden offers a unique and high-quality solution to your Asian market research needs. Consider Holden your "team on the ground" in Asia. With over 3 million members, Holden has panels in China, Japan, Korea and every major Asian market. In addition, we have local teams in all local markets to provide valuable insight and ensure your research project is suitable for the locality. We work with our clients to support any aspect of the research process – including sampling only, project management, recruitment, moderation and analysis/research reporting. We are here to support your efforts to understand the increasingly sophisticated and ever-evolving Asian consumer.

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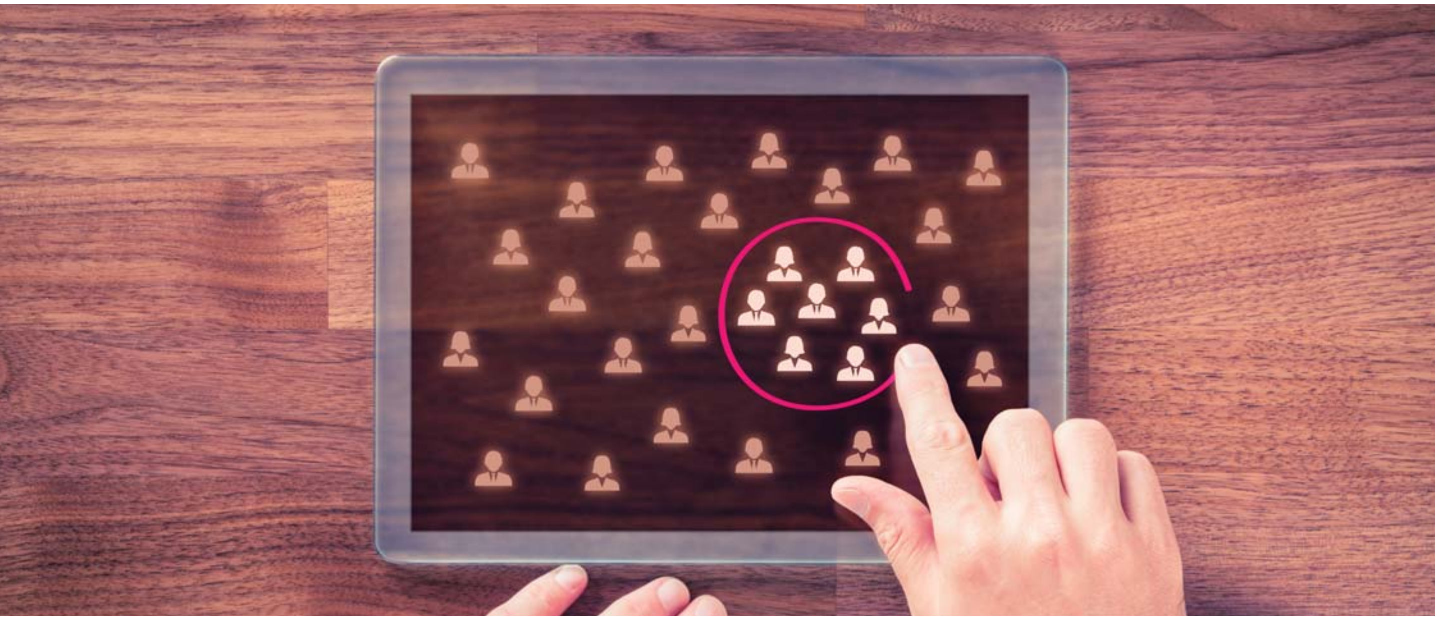
E-mail Team@holdendata.com; Jeffrey.Kelsch@holdendata.com
www.holdendata.com



InnovateMR

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

InnovateMR helps connect researchers to a global network of verified B2B professionals, enabling organizations to stay attuned to the marketplace. With over 50 security checks spanning the participant life cycle, the InnovateMR First Class Panel™ ensures high-quality data you can trust. From IT decision makers to contractors, Innovate's unique recruitment strategy and extensive firmographic profiling, which aligns to Microsoft's B2B taxonomy, allow you to reach even the most niche target audiences. B2B market research can be challenging and complex to execute – partner with the experts at InnovateMR to help make your next project a success.

Phone 1-888-229-6664
www.InnovateMR.com

Insights Opinion

Founded 2015 | 20 employees
Sharoz Ghauri, CEO and Abrar Ahmed, Vice President, Research Services

Insights Opinion is a market research company, providing project management and data collection services to

market research firms/consultants since 2015. We at Insights Opinion stand ready to assist you on your research needs with our full slate of research capabilities and our coverage in North America, Europe, Latin America, APAC, the Middle East and the Caribbean. For many years, clients have counted on us for their consumer, B2B and health care research needs in these regions. Whether it is ongoing tracking studies or ad hoc research, we have full capabilities to handle your research needs. We are pioneers in online sampling. We stand for high-quality data, cutting-edge panel management technology and complete data protection compliance, confirmed by our ISO 20252 and ISO 27001 certifications. We can support all kinds of projects and have expandable reach in B2C, B2B, community building and health care capabilities!

Phone 91-971-183-0789
www.insightsopinion.com

Logit Group Inc.

Founded 1997 | 250+ employees
Sam Pisani, Managing Partner and
Anthony Molinaro, Managing Partner

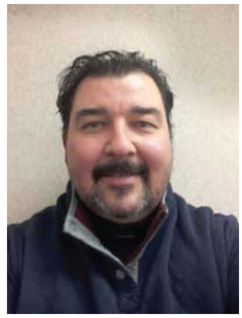
The Logit Group has consumer, B2B, multicultural and medical-specific panels that cover North America, Europe,

Asia and South America. With over 100 data points profiled, we can target unique and niche audiences. We routinely conduct studies in more than 40 languages including Spanish, French, German, Mandarin, Cantonese, Hindi, Urdu and Punjabi and offer supporting online services including programming/hosting, translation, coding and tabulation. Contact us to learn more about how we can help you with your next project.

Phone 1-866-84-LOGIT
logitgroup.com/online_panel

Mindfield Online Internet Panels

Founded 1980 | 110 employees
Gary McMillion, CEO



Still the premier online consumer proprietary panel! Powered by more than 40 years of market research and data collection experience. We were a tenured and respected research company long before creating a high-quality proprietary panel using core industry principles to insure quality data (IQD) on every project. Our IQD real-time electronic countermeasures deeply line every project to eliminate quality issues as they occur and our panel is 100% Experian Data Quality-verified. Let our experienced team help you with the hard and easy projects on your board.

Phone 1-800-969-9235
MindFieldOnline.com

mo'web

Founded 2004 | 41 employees
Herbert Höckel, CEO

Building valuable insight relationships between great businesses and their customers is the core mission of mo'web research, based in Düsseldorf, Germany. mo'web research is your preferred partner for everything surrounding digital market research. They provide best-practice fieldwork, data analysis and consultancy services. mo'web takes pride in excellent customer service and impeccable data quality and are committed to go above and beyond for your benefit. The center of everything mo'web does is built around a global community of 2 million consumers and 750,000 business decision makers waiting to engage in insightful conversations about their beliefs, behaviors and experiences.

Phone 0049-0-211-8282800
E-mail info@mowebresearch.com
www.mowebresearch.com

myCLEARopinion Panel

Founded 2008
Mitch Henderson, CEO

Stop using multiple databases, customer-supplied spreadsheets or rented lists in hopes of finding the right people for your B2B research needs. Expand your vision to include more than internal and direct customer feedback. Call myCLEARopinion Panel today. Specializing in B2B skilled industry sample, myCLEARopinion provides access to a unique and powerful audience of U.S. decision makers representing HVAC, engineering, architecture, construction, maintenance, flooring, roofing, plumbing, mechanical systems, packaging, manufacturing, safety, security and food and beverage industries. We offer online sample, research services, hosting and programming. Curated for market researchers by market researchers – you will love working with myCLEARopinion Panel.

Phone 1-248-786-1274
www.myclearopinionpanel.com

Netquest

Founded 2001 | 276 employees
Ben Boix, Managing Director U.S. and Canada

Since 2001 Netquest has provided market researchers with genuine and insightful data. Netquest's consumer panel and data collection capabilities in more than 20 countries make us a trustworthy partner that helps institutions and businesses analyze the market, gain valuable insights and genuinely understand consumers. Find the most suitable target with our representative samples – ad hoc samples, trackers, omnibus, ad tracking, precision surveys and advanced samples. Observe and measure the online behavior of consumers – digital behavior data, geolocation services, audio-matching data, path-to-purchase analysis dashboard and Netrica. Decide how you want to collect your data – express scripting, scripting moving forward, online community platforms and Do-It-Yourself Survey Tool. Get the most out of your customer database – dedicated panel and Netstudio. Edit, encode, tabulate and classify your data – file encoding, tabulation, conjoint, max-diff and visual data.

Phone 1-267-475-9919
E-mail bboix@netquest.com
netquest.com

Opinions 4 Good (Op4G)

Founded 2010 | 30 employees
Frank Nappo, CEO and Frank Hayden, COO

Op4G is a premier data collection company with unique recruitment methods and best-in-class programming services. We work in conjunction with nonprofit partners and trade associations to find hard-to-reach audiences for participation in our clients' surveys. Our unique approach to recruiting yields a highly engaged group of people who, as respondents, are dedicated to helping our market research clients fulfill their information needs. Clients' incentive funds have allowed panel members to donate nearly half a million dollars to nonprofits worldwide. Op4G is your trusted partner for everything from difficult recruits to everyday consumers. Op4G is headquartered in Portsmouth, N.H., and operates globally.

Phone 1-603-766-5858
www.op4g.com

OvationMR

Founded 2017
Jim Whaley, CEO

Fast, Reliable Answers for Insightful Decisions®. Significantly improve your online research success with dependable survey data from B2B and consumer audiences. Our mission: Expand opportunities for researchers to do the work you believe in and can stand behind, for your company, your community and your cause. OvationMR services cover sampling, programming and hosting, translations and design and analysis for brand tracking studies, market segmentations, conjoint analysis, awareness and usage studies, customer experience, concept testing and political polling. Our clients include research practitioners, consultants, governments, NGOs and global brands. We offer survey audience sampling and supporting research services globally. Contact us today at: info@ovationmr.com.

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

Paradigm Sample

Founded 2009 | 67 employees
Cyrus Deyhimi, CEO

Led by industry experts, Paradigm Sample has distinguished itself with its relentless spirit to deliver unparalleled service, data quality and reach. We take pride in our diverse, tenured and industry-vetted team. We connect our clients to real people, harvesting global feasibility, enriched profiling and real-time technology to ensure our clients' success. We offer access to millions of well-profiled consumers, including low-incidence, hard-to-reach audiences. We use proven methods and cross-platform technologies to optimize our research performance. Paradigm Sample acquired the assets of Tellwut Corp. in October 2020. Tellwut's U.S. and Canadian proprietary panel, programming platform and API integrations enable Paradigm to deliver more sample and offer DIY programming capabilities. Paradigm is headquartered in New York and has additional offices in Canada and India.

Phone 1-914-772-6030
corporate.paradigmsample.com

Rare Patient Voice LLC

Founded 2013 | 15 full-time employees; 50 part-time patient advocates
Wes Michael, President and Founder

Rare Patient Voice recruits hard-to-find patients and caregivers (rare and non-rare) in the U.S., Canada and U.K. for qualitative and quantitative market research. We attend patient events such as conferences and walks to build our panels so that our patients are authentic and we can complete recruits within two weeks. We focus on recruiting only. A hundred thousand patients and caregivers across 496 diseases/conditions. A few of our panels include: all cancer types, Crohn's, cystic fibrosis, diabetes, epilepsy, Fabry, Gaucher, hemophilia, HIV, Huntington's, lupus, mental health, multiple sclerosis, Parkinson's, primary immunodeficiency, PNH, pulmonary hypertension, sickle cell and spinal muscular atrophy. Contact us to get a bid with feasibility and costs at any time.

Phone 1-410-218-0527
pam.rarepatientvoice.com
www.rarepatientvoice.com

ReRez

Founded 2002 | 10 employees
Debbie Peternana, CEO

We simplify the difficult. Online panel specialist and methodology consultants specializing in quantitative studies. Using our patent-pending StartZONE technology, we can aggregate 2-100 partners, tracking, deduping and reporting. We can reach the most difficult audiences, from pig farmers in Brazil to financial analysts with AUM levels of over $100 million. Use us for the easy projects as well! We offer more than 50 million panelists worldwide and custom-built databases – low IR, decision makers, financial analysts and investors, IT, C-level, physicians, patients (hemophilia, cystic fibrosis, diabetes), Hispanics and over 400 segmentation variables. Fast turnaround, flexible pricing and accountability to do what we say we are going to do. Send us a bid and experience our unique solutions and out-of-the-box thinking. If we can't do it, it cannot be done!

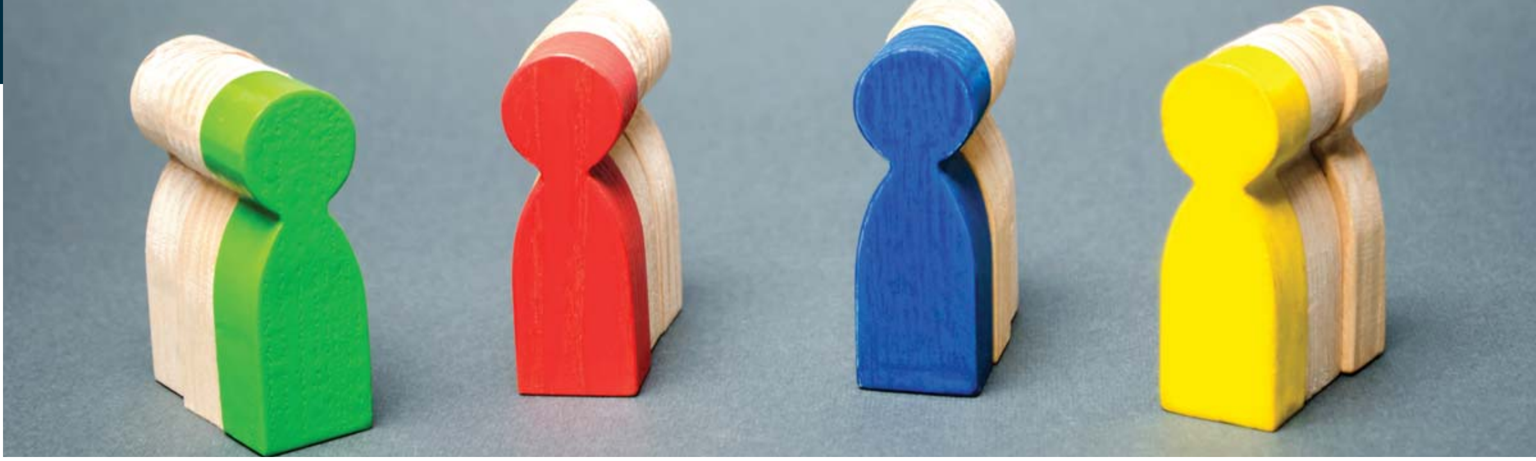
Phone 1-972-795-8525
www.rerez.com

Schlesinger Group

Founded 1966 | 1,200 employees
Matt Campion, CRO

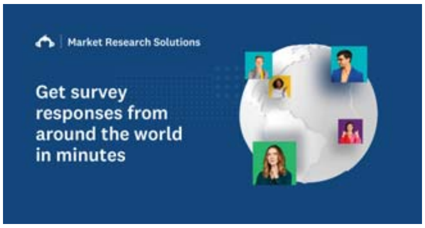
Trust our global portfolio of consumer, B2B and health care panels and our experts who leverage them for better research results. Deploying exceptional data collection capabilities, we manage thousands of studies and process over 14 million survey completes each year. Our panels support any quantitative or qualitative method and target, from high-touch engagement for hard-to-reach targets to automation and data science for speed and reach. Market Cube, integrating with Schlesinger Group, enables high-quality data faster, with more intelligence, agility, diversity and scope. Through the combined power of vast proprietary panels and highly scrutinized industry-leading partners, we provide a single point of access to nationwide and niche audiences for your research studies globally. Contact Chawntae.Applegate@SchlesingerGroup.com.

Phone 1-513-284-3265
SchlesingerGroup.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 their target market, 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 survey platform and 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.

E-mail marketresearch@surveymonkey.com
www.surveymonkey.com/market-research

Symmetric, A Decision Analyst Company

Founded 2016 | 150+ employees
Jason Thomas, President of Symmetric

Symmetric operates American Consumer Opinion®, a worldwide panel of over 7 million consumers. Symmetric also operates five B2B worldwide online panels: Physicians Advisory Council®, Medical Advisory Board®, Executive Advisory Board®, Contractor Advisory Board® and Technology Advisory Board®. Symmetric places a high value on representative samples, scientific sampling methods and advanced fraud-detection systems. Our online panels are carefully balanced, continually refreshed and systematically cleaned. Nonresponders, speedsters and cheaters are continually purged. Symmetric provides sample for both qualitative (focus groups, depth interviews and ethnographies) and quantitative projects. Additional services include programming, hosting, online communities, tabulation, coding and IHUT mailing.

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

Toluna

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

Toluna delivers real-time consumer insights at the speed of the on-demand economy. By combining global scale and local expertise with innovative technology and award-winning research design, we help clients explore tomorrow, now. Toluna is the parent company of Harris Interactive Europe and KuRunData. Together, we strive to push the field of market research toward a better tomorrow.

Phone 1-203-834-8585
www.tolunacorporate.com

Data-mining Wikipedia - a new frontier of insights

| By Michael Lieberman

snapshot

Michael Lieberman explores how network analysis can help researchers understand brand, business and marketing relationships.

The definition of Wikipedia is "a free, web-based encyclopedia project which contains information on a wide variety of subjects which are added by contributors from all over the Internet." The world's eighth-most trafficked public website, Wikipedia is an open-source wiki software and, as with all wikis, it allows everyday users to create and edit webpage content in any browser.

Business and brand use of Wikipedia is ubiquitous. Every business/brand/city/enterprise has a Wikipedia page. Each wiki page is essentially comprised of a concept and a relationship to other concepts.

And now, thanks to network analysis, these pages can be mined by insights professionals to describe brand spaces, understand the conversation around an advertising campaign or explore the social landscape of a product.

Network analysis software allows us to feed it a Wikipedia seed page – the seed page is the first page the software looks for, like "Marketing" or "IBM." The next step is to define other wiki pages that are mentioned or connected to the seed. Once established, the software determines where the other pages are connected to each other. In network parlance, this is called a neighbor-neighbor network.

Once the links are established, a macro that clusters connections is run. This categorization of network links is not different than, say, a factor analysis, which looks for underlying structures of data using statistical algorithms. The software then visualizes their positions and creates links for each wiki in the map and where they stand vis-à-vis the seed page. This creates an ecosystem of relationships with immense research value.

In this article we will provide a brief background to the Wikipedia network space. From there we will run through the process of an insights-mining exercise (for example, the connected articles of an industry) using the knowledge networks produced by successive Wikipedia maps, followed by an explanation of next steps to give the shape of the social conversation in-depth context.

Define it

Strategists often talk about wanting to control the social media conversation around a brand or company. Given the dispersion of the landscape of social media, the first challenge to control the conversation is to define it. One method is to explore the shape, or frame, of its connections. This is accomplished by the above-described knowledge network.

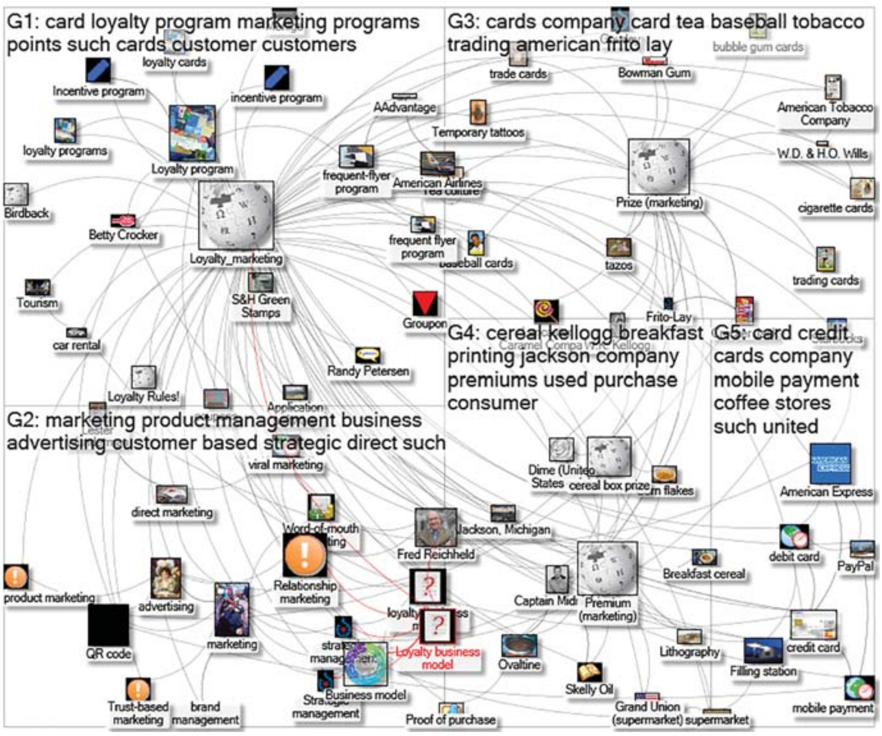
A knowledge network is a group of people who are equipped with tools that enable collaboration, interaction and sharing of work-related experience, know-how, expertise and resources. Every knowledge network is created under a unique set of circumstances.

Marc Smith, founder of NodeXL, a network visualization tool that includes access to social media network data importers, advanced network metrics and automation, says, "A Wiki-

www.quirks.com/articles/2021/20210104.aspx

Figure 1

Figure 2



pedia network map reveals webs of interrelated concepts and entities that are not necessarily obvious. And clusters that are not obvious. These maps can be semantic groups, ontologies [entities that really or fundamentally exist for a particular domain of discourse] or knowledge graphs. Looking at a wiki page is like looking at a leaf – not the branch, not the tree, not the forest. Network analysis allows us to see the relationships between a page and its neighbors and to see clusters of relationships among topics."

In other words, when given a seed article, what other articles or subjects are connected to that wiki? It's the connections that tell the story and those connections can be represented by a series of Wikipedia network maps.

As an example, let's look at Figure 1, which shows a map using the seed page on Wikipedia for "Marketing_Research." The size of the sphere indicates its centrality, that is, how many other wikis are connected to it. The seed article, "Marketing_Research" has the largest sphere. The spheres are also clusters according to how they relate to each other. Thus, from this map we can learn:

G1: Highlights the foundations of the marketing research industry; which other Wikipedia pages are directly connected to the broader seed page and vital uses of marketing research such as consumer behavior and social network potential.

G2: Focuses on the interconnections of various analyses such as pricing, brand marketing and brand awareness.

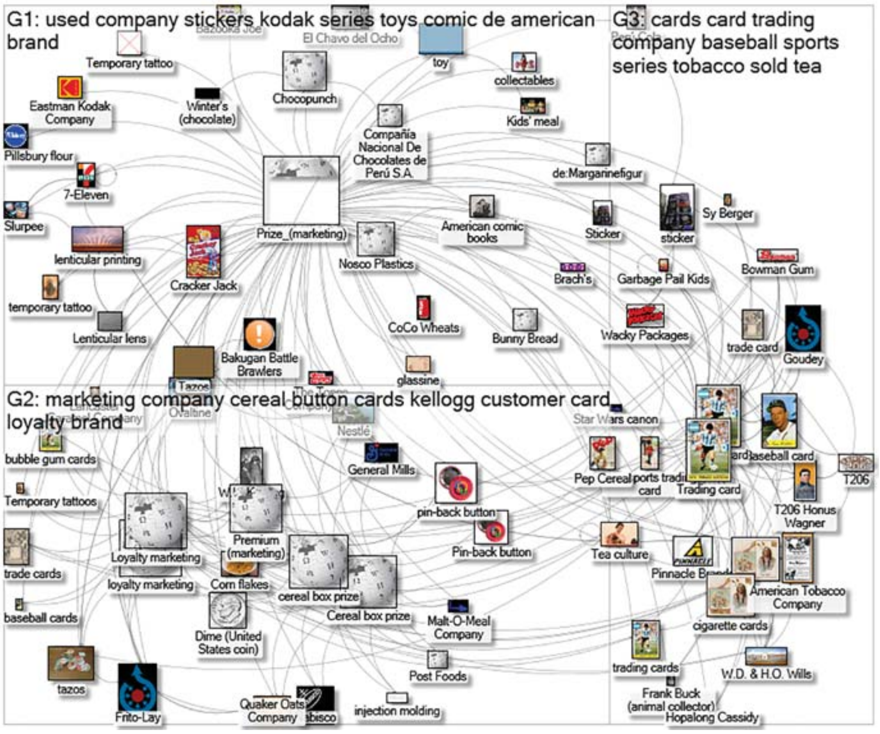
G3: A third group we can call the "quantitative group," as it shows that many Wikipedia pages that are connected to the seed page are connected to each other, such as new product development, price elasticity and conjoint analysis.

G4: Highlights the advertising research connections within the marketing research knowledge network.

Loyalty marketing, a connected part of the marketing research knowledge network map, is another way to illustrate the research process of media wiki mining. Branding, product marketing and loyalty marketing all form part of the customer proposition – the subjective assessment by the customer of whether to purchase a brand based on the integrated combination of the value they receive from each of these marketing disciplines.

The research process for a Wiki-

Figure 3



pedia project is a sequential series of network analyses. As stated before, it begins with an industry snapshot. We would then attempt to drill down and examine comparative relationships within maps. In our example study, let's say we are trying to create an in-depth knowledge space for loyalty marketing efforts. The natural next media wiki map would be of "Loyalty Marketing," which is shown in Figure 2.

The interwoven network loyalty marketing media wiki pages begins with the first group:

G1: Linking to various types of loyalty marketing and who is undertaking them.

G2: The second group of linked Wikipedia pages (G2) explores relationship marketing by means of direct or viral marketing, word-of-mouth and trust-based methods.

G3: The third group (G3) features connected wikis of prize marketing; if, for example, a brand did not realize the prize marketing is connected to loyalty marketing.

G4: A subgroup of breakfast foods and premium marketing programs.

G5: Credit card company loyalty programs are linked on Wikipedia.

The continuation of the study would be perhaps to create a series of maps around specific companies, comparing their individual knowledge spheres. For example, setting the seed for "Prize Marketing" would result in the map in Figure 3.

With comparison of multiple maps we can then form insights into the section of the report. It would be difficult to display 10 graphics in this article. However, here is an outline of the course of a given study:

- industry media wiki knowledge network maps;
- client and major competitor media wiki maps;
- current comparative social conversations around the industry, client and competitors;
- which companies are involved with prize-marketing strategies.

A deeper dive into this research project is beyond the scope of this article but one must not forget that each Wikipedia page contains information and details of its elements. Furthermore, the social conversation around a topic could be followed on other social media platforms.

Vital aspect

Media wiki networks have been around since the turn of the century and they are still a vital aspect of the online behavior of commercial entities, private individuals and governments. We expect the availability of tools such as NodeXL to have a positive impact on marketing research in a previously untapped space.

As mentioned above, dynamic media wiki analysis is a fruitful area of study, as is research into approaches for jointly analyzing media wiki and text-content data. Companies have learned to harness the power of thought leaders, experts and influencers to promote their products and they can use media wiki web space visualizations to better understand the shape of those networks.

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••• health care research

Acute or chronic?

Survey assesses the longevity and impact of COVID-19-related changes to physicians' practices

| By Kathleen Evans, Catie Barbieri and Stacey Cowgill

snapshot

From telehealth to sales rep interactions, how are doctors faring during the pandemic?

www.quirks.com/articles/2021/20210106.aspx

COVID-19 has changed the way people all over the world work and live and physicians are certainly no exception. To understand the impact of COVID-19 on physicians in the U.S., Healogix fielded a quantitative survey in spring 2020. We reached 502 physicians across 10 specialties to gain their perspective on this unprecedented time and how it may be affecting their practices. For more detail on the sample included and the screening criteria, please see Figure 1.

Use of telehealth

Prior to COVID-19, 68% of physicians surveyed did not use any form of telehealth in an average week. When asked why, about half cited reasons such as less favorable insurance coverage/access, less favorable reimbursement and the perception that it is a less effective way of practicing medicine compared to in-person visits. Of those surveyed who did not regularly conduct telehealth visits before COVID-19 restrictions, 42% indicated they did not have the capability, with this percentage being particularly higher for physicians in hospital-based practices (56%) than in community-based practices (35%). In a separate line of questioning, hospital-based physicians were also significantly less likely to agree that nearly all their patients have access to the technology necessary to conduct telehealth visits either, as compared to community-based physicians.

In terms of physician specialty, psychiatrists appear to be the most telehealth-friendly specialty as they were more likely to be already utilizing telehealth before COVID-19 restrictions were implemented and reported the highest volume of telehealth visits since the restrictions began (84%). Prior to the pandemic, the vast majority of gastroenterologists (80%) and allergists/immunologists (84%) reported not conducting telehealth visits in an average week. However, gastroenterologists reported the second-highest volume of telehealth visits since restrictions were implemented (69%), while allergists/immunologists were significantly lower, at 49% of their

visits. Oncologists reported the lowest volume of patient visits as telehealth since restrictions were implemented, at 45%.

How physicians engage in telehealth visits has also changed since the pandemic began. Prior to COVID-19, physicians were using phone calls with no video component most often. However, during COVID-19 the use of video-enabled calls such as Zoom or FaceTime rose significantly and replaced phone-only calls, except among Midwest physicians, who reported using phone-only calls significantly more often than their counterparts in the West and South (35% of visits versus 27% and 23%, respectively). Use of telehealth-enabling apps such as Doximity, Doxy.Me or Teladoc and EMR systems such as Epic or Cerner did not change significantly due to the pandemic. At the time of the survey, most physicians reported using two or more of these modalities to conduct their telehealth visits.

About half of physicians included in the survey reported that both they and their patients are satisfied with telehealth visits, while about one-quarter feel neither party is satisfied. Physicians with a higher volume of younger patients (i.e., <55 years of age) tend to feel both parties are satisfied more than their counterparts with an older patient base (55% vs. 41%, respectively). While most physicians did report feeling satisfied, there were some concerns. About two-thirds worried about missing clinically important cues via telehealth and nearly half had concerns about the quality of care they are

Figure 1

Methodology & Sample

Methodology:
10-minute online interview

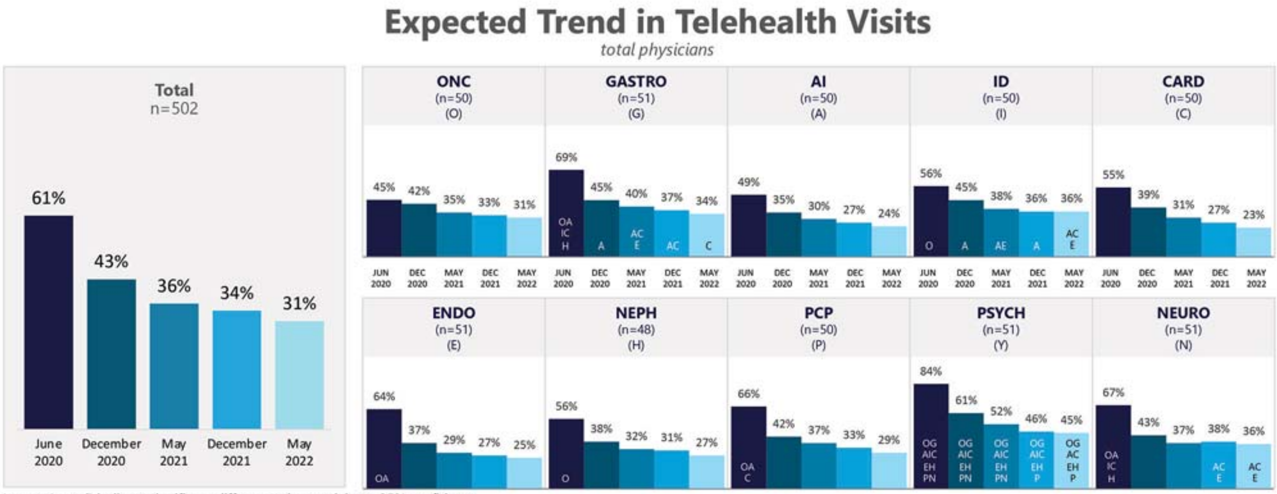
Field Dates:
May 26 – June 11, 2020

Sample:
502 physicians, across 10 specialties

50	ONC	Oncology/Hematology-Oncology
51	GASTRO	Gastroenterology
50	AI	Allergy/Immunology
50	ID	Infectious Disease
50	CARD	Cardiology
51	ENDO	Endocrinology
48	NEPH	Nephrology
50	PCP	Primary Care/Internal Medicine/Family Medicine
51	PSYCH	Psychiatry
51	NEURO	Neurology

Screening:
- Board-certified or board-eligible in specialty
- In practice for 2-35 years
- At least 60% of time spent managing/treating patients
- At least 10 patient visits (whether in-person or telehealth) in the last week for any condition
- At least 10% of last week's visits were telehealth
- Have conducted telehealth visits for at least 3 weeks at time of completion
- No market research conflicts of interest

Figure 2



Letters (noted) indicate significant differences by specialty at 95% confidence
S70. Last week, what percentage of your patient visits were telehealth visits? | D20. How do you expect the frequency of telehealth visits will change over the next 24 months? For reference, you said [S70 RESPONSE] of your patient visits were telehealth visits last week. (Scale: 0=0% of visits will be telehealth to 100=100% of visits will be telehealth)

Figure 3

Types of Patients Seen in Telehealth Visits

total physicians

	New patients I had never seen before COVID-19	Patients I had seen a few times before COVID-19	Patients who have been in my practice for years	**Patients with acute conditions**	Patients with chronic conditions who are stable	Patients with chronic conditions who are progressing
Total (n=502)	57%	76%	88%	50%	89%	63%
ONCs (n=50) (O)	28%	64%	74%	16%	P 92%	28%
GEs (n=51) (G)	OICHP 78%	OICHP 88%	O 90%	OCE 61%	86%	O 67%
AIs (n=50) (A)	OC 62%	O 82%	O 90%	OCE 66%	P 94%	O 68%
IDs (n=50) (I)	O 50%	72%	O 90%	OC 52%	82%	O 54%
CARDs (n=50) (C)	42%	66%	O 90%	28%	P 94%	O 56%
ENDOs (n=51) (E)	OC 63%	76%	O 92%	O 41%	88%	OICP 76%
NEPs (n=48) (H)	O 56%	67%	85%	OC 52%	92%	O 69%
PCPs (n=50) (P)	O 48%	68%	80%	OCEN 70%	78%	O 58%
PSYCHs (n=51) (Y)	OICHP 78%	OICEHP 92%	88%	OCE 67%	P 92%	OICP 82%
NEUROs (n=51) (N)	OC 65%	OICHP 88%	OP 96%	OC 51%	90%	O 67%

Letters (noted) indicate significant differences by specialty at 95% confidence
A70. What type of patients are you seeing in your telehealth visits? (multiple selection)

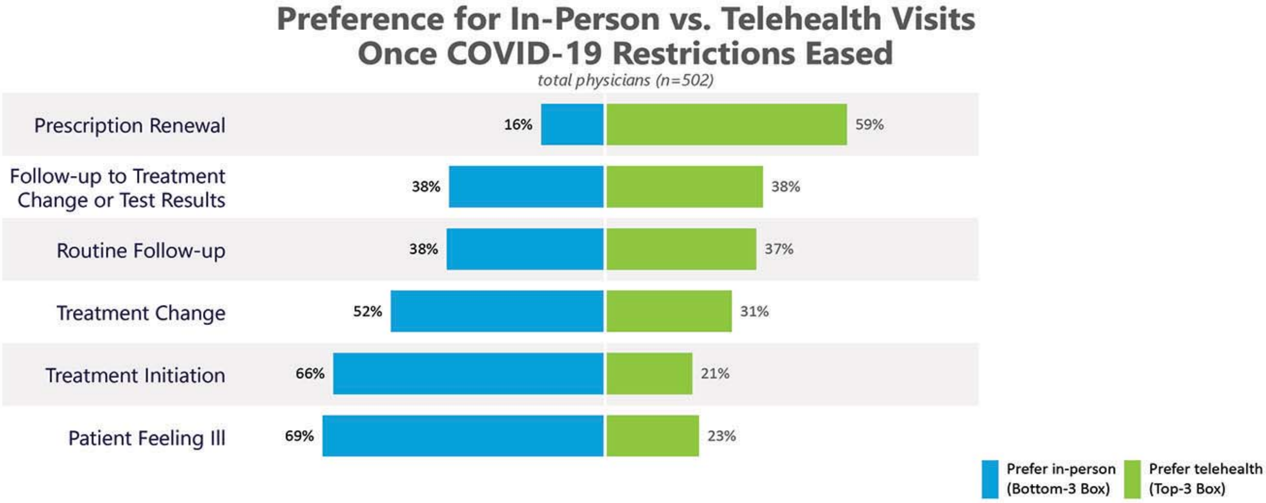
able to provide via telehealth and their ability to record all necessary clinical measurements for their specialty and patients in a telehealth visit.

Looking to the future, physicians expect the proportion of telehealth visits to decline as they move through 2021, though they do expect about one-third of their visits to still be via telehealth by early 2022 (Figure 2). Consistent with use of telehealth pre-COVID restrictions, psychiatrists anticipate conducting a significantly higher volume of telehealth visits through 2021 and into 2022 than other specialties surveyed. One in five physicians overall and 39% of psychiatrists – a significantly higher proportion that all other specialties surveyed – expect the majority of their patient visits will be telehealth in May 2022 for reasons such as convenience, COVID-19 uncertainty and a belief that telehealth is the future of health care. Only 10% of allergists/immunologists surveyed believe the majority of their patient visits will be telehealth in May 2022. After COVID-19 restrictions have eased, physicians overall expect about two-thirds of their patients will feel comfortable enough to return to the office in person.

While telehealth is unlikely to constitute the majority of visits for most physicians surveyed if/when COVID-19 restrictions ease, telehealth does appear to be here to stay in a more significant way than pre-COVID-19.

Given the perception of telehealth as a less effective way to practice medicine by many physicians surveyed, this presents an opportunity to support physicians as they make a transition to more regularly scheduled telehealth visits. When asked how a pharmaceutical manufacturer could support their use of telehealth, most ranked PDFs/electronic handouts for patients as most preferred, followed by websites for patients and then webinars for patients. Unaided, 35% indicated patient education materials would be helpful and 24% want better access to samples and copay cards for patients they see via telehealth. By providing these materials to assist physicians in helping

Figure 4



D30. Once COVID-19 restrictions have eased and if given a choice, would you prefer telehealth or in-person visits in the following situations: (Scale: 1=Strongly prefer in-person visit, 4=No preference, 7=Strongly prefer telehealth visit)

their patients, pharmaceutical companies can improve physicians' comfort with telehealth moving forward.

Easily accessible and straightforward platforms will also likely provide needed support to physicians and patients as they move forward with telehealth. With the drop in preference for phone-only calls, video-enabled platforms will likely be preferred among physicians across the board for telehealth visits. Also, given the perception by many physicians that they or their patients do not have access to the necessary technology, education on the types of platforms/apps available and ensuring easy access will be crucial for future telehealth visits for physicians and patients alike.

Clinical activities

At the time of surveying, physicians of all specialties reported experiencing a significant drop in weekly patient volumes, with an average decrease of 28% and primary care physicians (PCPs) and gastroenterologists being most notably affected with 38% and 41% decreases, respectively. When it comes to comparing clinical activities via telehealth during COVID-19 vs. in-person before COVID-19, physicians indicated they were switching and/or initiating treatment about one-third less often. Of note, oncologists reported initiating treatments about half as often. Orders for routine lab work appear to be the least affected by COVID-19.

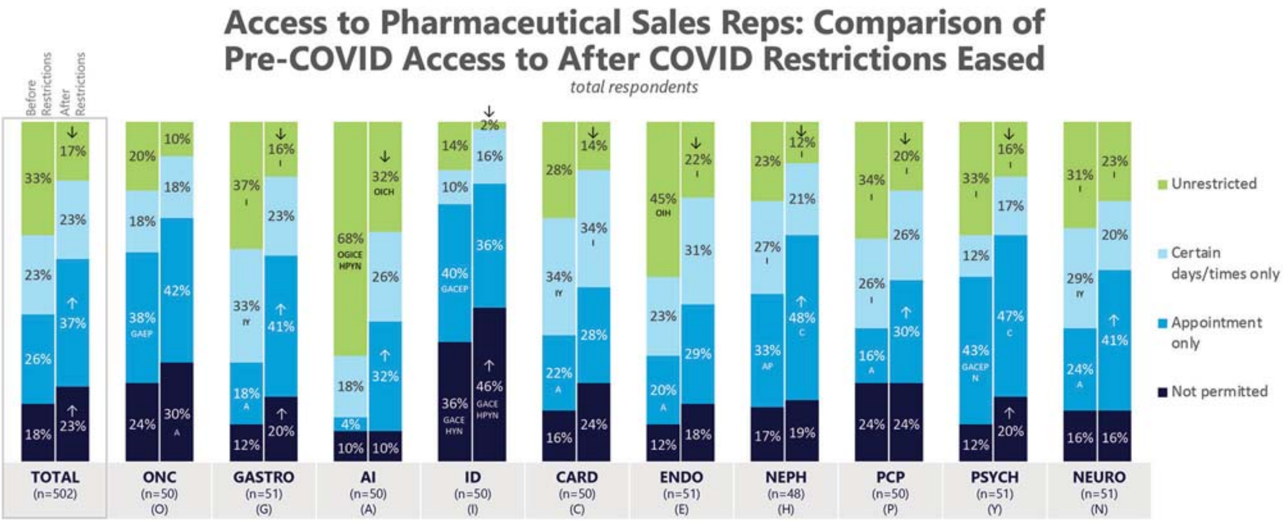
Physicians also reported seeing new patients about half as often as before COVID-19 restrictions were implemented in their current telehealth visits, with PCPs and allergists/immunologists reporting their new patient volume is 38% and 39%, respectively, of what it was prior to pandemic restrictions. When asked what type of patients physicians are seeing (Figure 3), only 28% of oncologists reported seeing new patients at all via telehealth, which is significantly lower than every other specialty surveyed except cardiologists. Additionally, fewer physicians overall reported seeing patients with acute conditions via telehealth than other patient types in telehealth visits. The vast majority of physicians indicated they are using telehealth to see patients who have been in their practice for years (88%) and patients with chronic conditions who are stable (89%).

In the future, the majority of physicians surveyed would prefer to see a patient in person for things like illness, a treatment change or treatment initiation and handle prescription renewals via telehealth (Figure 4). Those living in areas with higher volumes of COVID-19 cases have an even stronger preference for the use of telehealth for prescription renewals. Unsurprisingly, physicians who didn't begin using telehealth regularly until after COVID-19 restrictions were implemented would prefer to go back to in-person visits at a higher rate across all situations.

Switching and initiating treatments via telehealth are areas with potential for significant implications for pharmaceutical companies moving forward. Ensuring access to samples for patients seen via telehealth could regain some of the switching activity that has been lost due to COVID-19. This may be an area of interest for physicians when they connect with sales reps and reps should be prepared to discuss how they can help. Support for co-pay card enrollment with electronic materials for patients and physicians' practices may also be an important element in ensuring patients can switch or be initiated on a medication, particularly when many patients are likely experiencing employment or other financial uncertainties.

Reductions in clinical activities may also be a direct consequence of reduced patient volumes, particularly for seeing new patients. Supporting use of telehealth both on the physician and patient side may prove beneficial in regaining lost patient volume as both physicians and patients become more comfortable with the modalities. While many physicians would prefer to return to in-person visits once pandemic restrictions permanently ease and believe most of their patients will feel comfortable enough to return in-person to the office when they do, it is difficult to predict when this will happen. It is worth further investigation to see how these physicians' views on telehealth for specific clinical activities change as they become more accustomed to telehealth visits with their patients and what resources they feel they need once they become more comfortable using telehealth. Also meriting more

Figure 5



Letters (noted) indicate significant differences by specialty at 95% confidence / ↑↓ = significant difference between before COVID and after restrictions are eased at the 95% confidence
D70. At the start of this year (January 2020), which of the following best describes your primary practice's policy regarding pharmaceutical sales reps? (single selection) [BEFORE RESTRICTIONS]
D80. Once restrictions due to COVID-19 have been eased, what do you anticipate your primary practice's policy regarding pharmaceutical sales reps will be? (single selection) [AFTER RESTRICTIONS]

investigation is how patients feel about transitioning to telehealth, the types of visits they would be comfortable making appointments for via telehealth moving forward and when they expect they will feel comfortable enough to return to physicians' offices in person.

Sales rep interactions

Looking to sales rep interactions, reps have been connecting with physicians most often through e-mail, followed by phone calls and video-enabled calls. However, at the time of the survey, about one-quarter had not interacted with a sales rep at all since COVID-19 restrictions began. This figure was higher among PCPs (30%) and infectious disease specialists (IDs) (34%) and lowest among endocrinologists (12%) and neurologists (16%). Physicians age 56+ (26%) were also significantly less likely to have interacted with a rep than physicians age 26-40 (13%).

A transition to remote rep visits brought on by COVID-19 is not an issue for most who participated in the survey. When asked about their preference for remote versus in-person, the majority either preferred remote or had no preference while about one-third preferred in-person interactions. Physicians who were regularly conducting telehealth visits prior to COVID-19 restrictions were significantly more satisfied with remote sales rep interactions than their counterparts and were significantly more likely to prefer scheduling a remote appointment. This suggests a generally higher comfort with remote-based communications in general.

When asked about anticipated changes to sales rep policies, the majority believe rep access will not permanently change due to COVID-19. For those who do foresee a change, most anticipate more restrictions, from reps needing to make appointments to them having no access at all to their practice (Figure 5). IDs report a policy of "not permitted" most often, both before COVID-19 restrictions were put in place and when anticipating a post-COVID scenario. Gastroenterologists and psychiatrists also anticipate significant increases in "not permitted" policies once COVID-19 restrictions are lifted. Allergists/immunologists foresee the largest drop in "unrestricted" access, going from 68% pre-COVID to 32% after COVID-19 restrictions are lifted.

Pharmaceutical and biotech companies will need to devise new, engaging strategies to connect with these practices that restrict their access. While most physicians do not anticipate permanent changes to their practice's rep policies once restrictions have lifted, it is unclear when or if in-person restrictions will ever be completely rescinded. Virtual detailing is likely to play an important role moving forward. It is a good sign that most physicians are reasonably satisfied with remote rep interactions early on in their implementation and as physicians become more comfortable with virtual appointments in general – including telehealth – satisfaction and comfort with these rep encounters will likely rise as well.

As with telehealth, there is also an opportunity to develop innovative apps for seamless communication using electronic detail aids with sales reps and medical science liaisons as they continue to engage in virtual detailing. While not assessed in this study, it is also worth considering whether direct mail could play an impactful role for sales reps, given physicians are likely receiving a high volume of e-mails given the pandemic restrictions on in-person detailing.

Flexible and responsive

While it is impossible to predict exactly when – or if – COVID-19 restrictions will fully ease it is clear that physicians across specialties have been impacted by COVID-19 in multiple, significant ways. Moving forward, it will be important for researchers, pharmaceutical/biotech companies and others who work with those in the health care industry to be flexible and responsive towards physicians' needs as they navigate this crisis with their patients.

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••• health care research

A mixed diagnosis

Pandemic telehealth experiences differ for patients and providers

| By John Thomas, Gabriela Pashturro and Catherine Salzman

snapshot

Patients like virtual visits but docs worry about quality, grumble over technology problems.

www.quirks.com/articles/2021/20210109.aspx

Over the past several months, many of life's tasks have shifted to online. From work to school to shopping, people have turned to virtual options to keep life moving while also staying safe. Across industries, companies have leveraged virtual options to maintain business – and the health care industry is no exception.

While telehealth visits have been around for a long time, the significant increase in usage – driven by the pandemic – makes them feel like an innovation, especially to patients. With this surge of new users, we conducted an online survey of telehealth users – 431 patients and 228 providers – to explore the experiences and behaviors associated with telehealth visits during the pandemic. (In order to participate in the study, patients and providers had to have utilized telehealth for at least one visit during the pandemic.) Here's a look at our findings.

Utilization and experience

It's no surprise that providers had more experience with telehealth leading into the pandemic and see more potential in leveraging telehealth during and post-pandemic as compared to consumers (Figure 1). Overall, our data shows that patients are very satisfied with their telehealth visits, with nearly half of patient respondents (47%) reporting being very satisfied. However, provider respondents are much less satisfied, with only 12% reporting that they are very satisfied with the telehealth experience.

Both patients and providers appreciate the efficiency of telehealth and rate experiences – such as the ease of scheduling, wait time and overall time spent for the appointment – very high (Figure 2). As one patient said, "I like it, I was seen quickly and she answered everything well, I thought, and I could get back to work and not spend hours at a doctor's office." Both groups also feel positive about the privacy and security of the information shared.

However, there is clearly a disconnect. How can nearly half of patients

ing telehealth. One provider said, "I have had so many problems with the technology that wastes time and interferes with patient care." These non-clinical care experiences were rated as one of the most negative factors among providers.

Advantages and disadvantages

If both patients and providers will be navigating a mix of in-person and telehealth visits moving forward, it is worth investigating the advantages and disadvantages to uncover why an individual might choose one option over the other. When asked to report on the advantages and disadvantages, patients and providers agree that telehealth visits are more efficient. Interestingly, while the comfort of sharing issues from home was seen as an advantage for both groups, patients were significantly more likely to report this as an advantage of telehealth compared to providers.

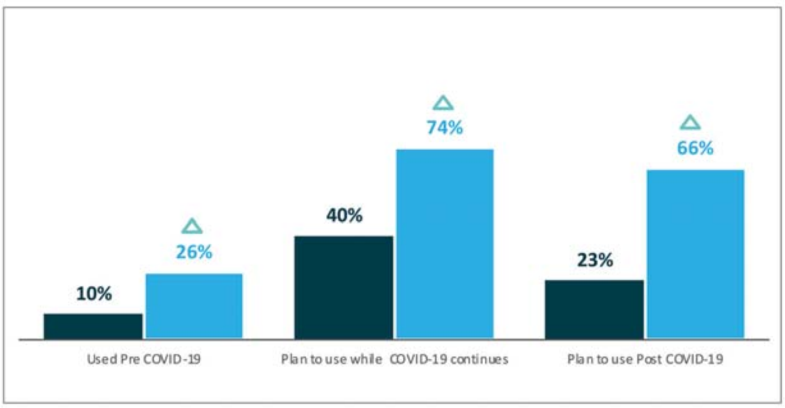
As for the disadvantages, agreement was found among both groups. While the top disadvantages are the same for both patients and providers, providers report issues with technology at significantly higher rates than patients. Providers also view diagnostics as a bigger disadvantage than patients, with over 50% stating it as a disadvantage compared to only 39% of patients (Figure 4).

A surprising disconnect in the findings centered on quality. While two-thirds of patients feel that telehealth addresses issues with the same quality as in-person visits, only 36% of providers feel the same (Figure 5).

Open to switching

While a majority of patients state they enjoy the convenience of telehealth visits, view the quality of telehealth the same as in-person and plan to leverage the service for at least some of their appointments in the future, we wondered if people would be willing to switch doctors or health plans to maintain this option moving forward. While in the minority, a notable 11% would be willing to switch doctors and almost 20% would be willing to switch insurance plans to maintain this option.

Figure 1



Burke Telehealth Research, Aug 2020, **Consumers n=431** and Providers n=228

△ = Significantly higher (90% C.I.)

Figure 2

HIGHEST RATED EXPERIENCES				LOWEST RATED EXPERIENCES			
9.3	•Schedule Appt Ease •Privacy & Security •Patient Wait Time for Provider •Length of Time Spend for Visit	8.8	•Wait Time for Patient to get Appt.	8.6	•Ability to Address Chronic Issues	7.0	•Login Instructions •Tech Use
		8.4	•Privacy and Security of Info Shared	8.3	•Ability to Diagnose Issues in Visit	6.6	•Ability to Diagnose Issues in Visit

Burke Telehealth Research, Aug 2020, **Consumers n=431** and Providers n=228

be very satisfied with their experience, while only 12% of providers feel the same way? Perhaps it is in the eye of the beholder. For example, Figure 3 shows that while patients feel they can effectively communicate and receive a high quality of care during a telehealth visit, providers are much less likely to feel the same way. Additionally, technology and log-in complications further exacerbate the issue for providers when it comes to embrac-

Figure 3

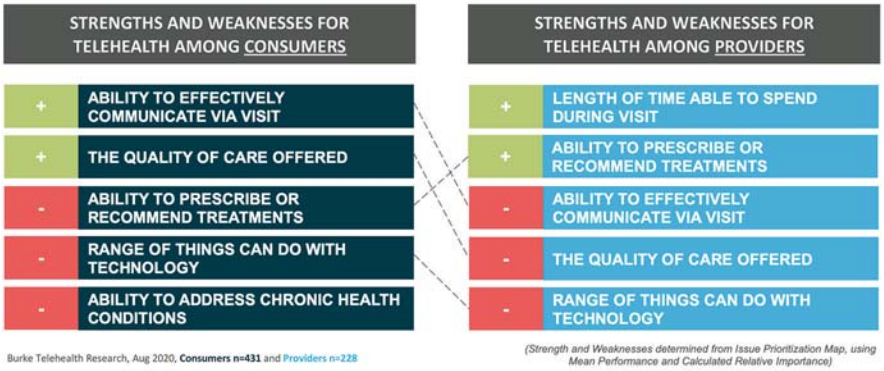
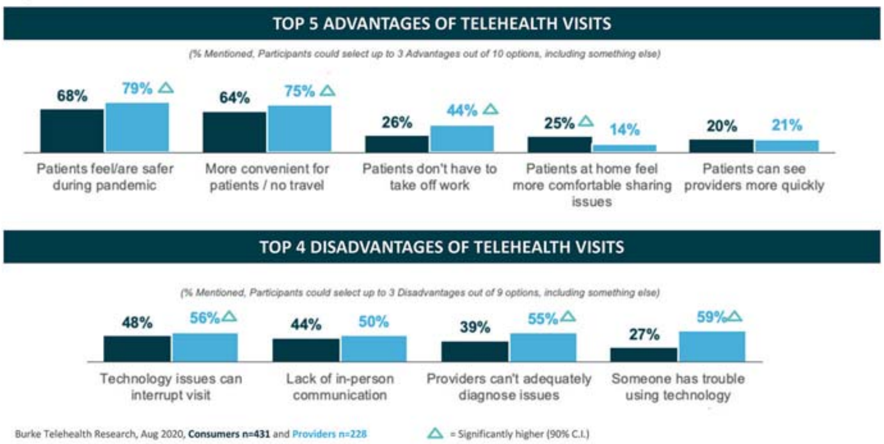


Figure 4



Providers, while less enthusiastic across a number of metrics, also recognize the value of the service to their practice, especially when it comes to growth and efficiency (26% agreed that telehealth services allow them to grow their practices and 39% agreed that it has improved efficiency).

Cost and quality questions linger

In addition, reimbursement for telehealth visits is an ongoing point of contention with providers, with many providers believing that telehealth visits should be reimbursed at the same rate as in-person visits, while a majority of patients feel that telehealth visits should be offered at a lower cost. Finally, there is a clear disconnect around quality of care. While 68% of providers believe telehealth will never equal the quality of care received during an in-person visit, a significantly lower percentage of patients feel the same way.

The interesting case for behavioral health

The results were segmented by those patients who received, and those providers who provided, behavioral health services during this past year. The results indicate that a significantly higher proportion of behavioral health providers (51%) were already utilizing telehealth for their patient visits compared to providers overall (26%). Behavioral health providers also reported a significantly higher share of all their visits pre-, during and post-pandemic being via telehealth, compared to providers overall (Figure 6). Additionally, 71% of behavioral health providers believe telehealth visits address patient issues just as well, or better than, in-person visits.

The future

While both patients and providers have embraced virtual services during the pandemic, early results indicate that patients appreciate this health care option more than those providing the care. This research helps uncover where the disconnects lie and sets the stage for improvements to help close the experience gap between patients and providers.

If we look closer at post-pandemic adoption, it may not be an either/or for respondents but rather a mix of medical visit options moving forward. Both patients and providers foresee the staying power of telehealth and believe there will be more telehealth visits than pre-pandemic (Figure 7). Patients anticipate about half of their visits to be serviced via telehealth in the future – similar to pandemic rates. Providers expect to reduce their share of telehealth visits from 40% of all visits during the pandemic to 22% post-pandemic.

While many were forced to try telehealth during the pandemic, most patients and providers will continue to opt for this choice post-pandemic. However, not all telehealth visits are created equal. As patients and providers begin to weigh their options, our research indicates that visits requiring a physical exam or diagnostics will remain largely in-person. Also, those who have had trouble with the technological aspects of telehealth – this includes both patients and providers – will likely revert to in-person visits. However, when efficiency is key, or for those more comfortable sharing sensitive information from the comfort of their home, telehealth may open the door for people to have more regular touchpoints with providers.

Finally, telehealth is allowing providers to meet with a greater number of patients and grow their practices without exhausting resources. While they may express a greater amount of frustration, the benefit to the bottom line will likely help keep telehealth an attractive option for providers moving forward.

Implications

To close, let's take a look at the implications for providers and for patients.

Utilization must be modeled closely. Telehealth was primed to support both patients and providers during COVID-19 and created an influx of new consumers and providers utilizing this approach but where will it land post-pandemic? While these next chapters have yet to be written, we can be sure subsequent reimbursement decisions will surely drive future utilization.

Providers are clearly less satisfied with telehealth than consumers. For those tasked with managing compo-

Figure 5

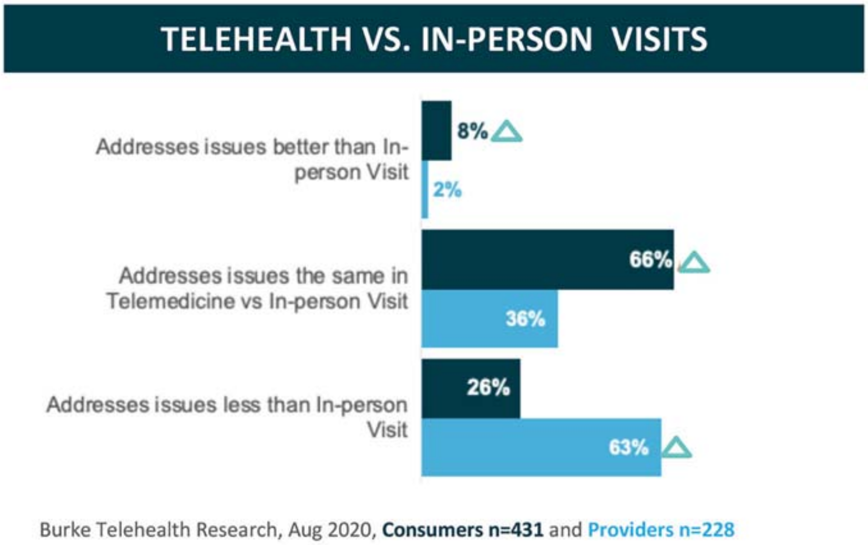


Figure 6

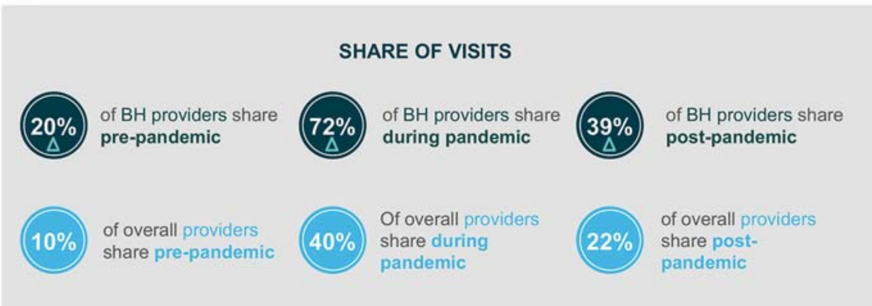
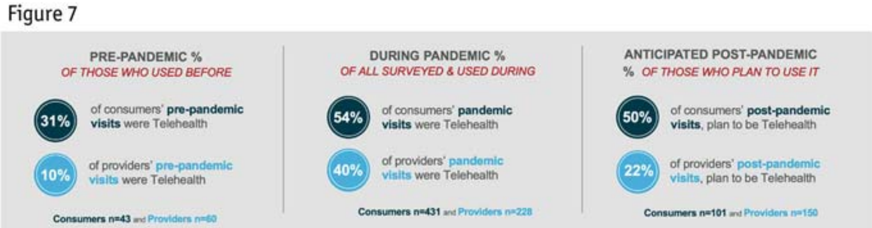


Figure 7



nents of telehealth for providers in organizations, focus on making technology an enabler instead of a distraction. Here, one size does not fit all, and determining quickly which niches of patients are best suited for telehealth will help ease some of the challenges, as will giving providers multiple telehealth models for various visit types.

Focus on the benefits of privacy and safety. Interestingly, patients and providers did not rate data safety and privacy as significant concerns when utilizing telehealth. However, given the general focus on consumer data privacy across industries, a lack of a worry here could be a true advantage – if managed properly. Privacy and safety are clearly seen as major advantages of telehealth visits, which can allow companies to further position telehealth utilization as part of the new normal.

Prepare to address potential switching behaviors. While the numbers of individuals who would switch doctors or health plans to keep telehealth visits as a future option is currently low (11%), once this option is unavailable, opinions may change. Consumers may be more inclined to seek out a new provider and/or plan to have continued access to the benefit of telehealth.

Behavioral health is one area primed for telehealth growth. With nearly 71% of behavioral health providers believing that telehealth visits address patient concerns as well as or even better than in-person visits, there clearly is an opportunity for growth.

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••• brand research

True to its mission

Research helps well-established global association stay central in a disruptive time

| By Rita Bartczak, Brian Ottum, Kathy Russell and Peggy Wyllie

snapshot

Engineering association SAE International used research to vet a boot-camp idea for training the next generation – even during a pandemic.

www.quirks.com/articles/2021/20210110.aspx

Founded more than a hundred years ago during the early years of the automobile industry, SAE International (SAE) has stood the test of time as a trusted source of expertise and education for the ground vehicle and aerospace industries. Committed to advancing mobility knowledge and solutions for the benefit of humanity, SAE's priorities are encouraging a lifetime of learning for mobility engineering professionals and setting the standards for industry engineering. From its roots as a technical journal publisher, SAE has grown to a global association that connects and educates 200,000 mobility professionals in 43 countries.

Beginning with the early days of auto production and flight to today's automatic braking, device connectivity and hands-off driving, SAE has evolved along with the industries it serves and become a central part of them. It has not taken this position for granted, however, and one of the ways SAE has retained its centrality is an ongoing commitment to train each new generation of engineers. "SAE is looking to prepare the next generation of engineers who are working not only on automated vehicles but also on new modes of transportation to be more effective in their jobs. Technology changes very rapidly and it's hard for four-year university programs to keep up and we think we can fill that gap," says Frank Menchaca, chief growth officer, SAE.

For example, the autonomous vehicle market is expected to grow by 63.5% by 2027[1], with an expected demand for global autonomous vehicles of 4.2 million by 2030[2]. This will result in an increased demand for engineers with skills to design and produce autonomous vehicles. Accordingly, the demand for ground vehicles engineers will grow and they will need to be able to collaborate across disciplines like robotics, lidar, machine learning and artificial intelligence. Experiential learning and teamwork will be even more important to design and produce these new vehicles. SAE is focused on developing these skills through hands-on learning with programs like A World in Motion (AWIM) and Collegiate Design Series (CDS).

A World in Motion taps into 50,000 dedicated global volunteers to bring

STEM education to life for students in grades K-8. Over 110,000 students and 1,500 instructors in 11 countries rely on AWIM to convey the basic science of movement that is the foundation of all future knowledge. The SAE Collegiate Design Series provides student teams the experience of designing, building and racing vehicles in a global competition via programs like Formula SAE, Autodrive Challenge and Clean Snowmobile. Through this intense experiential learning, students acquire hands-on design and building skills as well as important soft skills like teamwork that can set them apart from other job candidates. "Formula SAE has opened many doors for my students for jobs at companies including SpaceX. So when industry comes here to find good candidates, all the credentials they need are that the student was on a Formula SAE Team, did well and has my recommendation. And they get the job," says Robert L. Woods, professor of mechanical and aerospace engineering, University of Texas in Arlington.

Spurred concern

Throughout the evolution of its professional development, SAE has relied on connecting with its members and customers to build new programs and services. Most recently, a talent shortage in robotics for autonomous vehicles has spurred concern among both industry and engineering program faculty. "Competition is strong. Especially in the Bay Area, there are limited candidates with automotive background. And there are plenty of suppliers and new start-ups who are trying to hire the same talent. Google, Apple and everybody is hiring either robotics, A.I., autonomous driving or electrification engineers," says Scott Bang, director of engineering at Urban Air Mobility division of Hyundai Motor Group.

To understand this problem and its implications, SAE joined forces with the auto industry and self-driving-technology company Argo AI. SAE engaged market research firm Chestnut Hill Advisors to uncover reactions to a boot camp concept designed to prepare new recruits for full productivity quickly and increase the pipeline of qualified engineers.

Chestnut Hill Advisors was prepared to take on this assignment given its experience with talent research and having worked with SAE since 2015 to understand industry and academic needs to help engineering students build project-based skills.

The researchers conducted in-depth interviews among faculty, industry original equipment manufacturers (OEMs) and Tier 1 companies (large/technically-advanced companies that supply critical components to the OEMs).

The study focused on four key learning objectives: how faculty are integrating industry problems and preparing students for the workforce; how the industry recruits, onboards and trains new employees; common skills gaps among students and new hires; and reaction to the boot camp concept.

The insights pointed to the importance of broadening student skill sets. Faculty members cited strong growth in engineering programs and student interest in robotics, automation, technology and additive manufacturing. While their engineering graduates are in high demand as companies are eager to fill positions, schools face difficulties in helping students to collaborate across disciplines and improve their hands-on skills.

For their part, industry participants expressed a need for engineers with horizontal skills across disciplines and experience working with vehicles, robots or hardware. But it's difficult to find candidates with these skill sets who also have knowledge of the autonomous mobility and auto industries.

The research found that a hands-on robotics boot camp was a fit with the SAE brand. Both academic and industry participants were enthusiastic about the potential of a boot camp that combines in-person instruction, lab-based projects and teamwork and they shared suggestions for content and implementation. "There's a battle to get talent and it's a global battle. Any way – like this boot camp – that industry could train and tap the right people quickly and develop those pipelines is great," says Paul Oh, professor for Unmanned Aerial Systems, University of Nevada.

In evaluating the concept, those who participated in the research found the boot camp unique given its focus on autonomous mobility.

Their confidence in both the content and delivery of the program was underscored by SAE's reputation for expertise, learning and bringing professionals together. Indeed, students benefit by making connections with industry experts, faculty and mentors within SAE and for many, the boot camp can be the introduction to the association and what it can offer to new engineers.

Ready to move ahead

SAE was ready to move ahead given the demand for the boot camp and supporting market insights. Using the constructive feedback from the qualitative interviews, SAE partnered with Venkat Krovi, Michelin endowed chair professor of vehicle automation at Clemson University, to develop the curriculum of its first-ever robotics boot camp. The boot camp employed a hybrid learning approach that combined lecture, lab-based projects and teamwork in a 12-week program, open to both university students and engineers working in the industry.

As plans were coming together to pilot the boot camp in May 2020, COVID-19 struck. For an organization like SAE that had survived the Spanish flu pandemic in 1918, there was no option but to continue. The SAE Robotics Boot Camp Pilot was launched virtually and safely in September 2020.

Deeper understanding

Based on the qualitative research among participants to evaluate the boot camp experience, SAE developed a deeper understanding of student needs and perspectives. Boot camp students were positive in their assessment of their pilot experience, including the course design, assignments and group work. Two examples of feedback from boot camp pilot students:

"The boot camp is what I expected. I believe the course content is very good since it has a lot of practical challenges that help you to be a better engineer."

"As a technical person unfamiliar with robotics, I like the hands-on approach with the introduction to sensors and how things work behind the scenes."

Strong majorities found the instructor-led sessions valuable and the cohort meetings effective. "Now, almost 12 months shy of the outbreak's start, we've seen an even greater need for the skills the program conveys," SAE's Menchaca says. "The automotive world's move to more automated transportation is accelerating. The march toward safe, clean, sustainable automated vehicles is underway and we at SAE want to ensure that the industry has a workforce trained to advance it through applied, hands-on learning in a hybrid delivery mode."

SAE is on a path to unite and advance the new generation of autonomous mobility engineers through its commitment to the robotics boot camp and project-based learning. And through this journey, the SAE brand will continue to be at the forefront as a relevant learning partner and connector of industry and academia.

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••• brand research

Here's what we have in mind

Thinking of a brand packaging or image change? Ask the consumer before, during and after

| By Kelly Jasper

snapshot

As brands evolve to correspond to social movements, marketing research is there to help at every step of the way – even during a pandemic.

Amid a rising conversation surrounding social justice and systemic racism, some of the world's biggest brands are scrutinizing their images and their communication practices in order to meet the call for inclusion and equality. This is a big deal for established brands who have to navigate years of brand equity and label recognition – and balance that with their customers' expectations, along with their own company's social responsibility and the bottom line.

Research has found that consumers are indeed looking to brands to take a stand[1] on these important issues. This is a movement that has been many years in the making and it is not a simple flash in the pan. Many brands are facing the challenge head-on by taking another look at product names and labeling that may be considered offensive.

Some of the most high-profile changes have been well-documented[2] recently, with brands like Aunt Jemima and Uncle Ben's shifting imagery, packaging and names to eliminate any perceived racial bias. After more than nine decades with the imagery, Land O'Lakes has removed the Native American woman, Mia, from its packaging – rolling in the change as part of a 100th anniversary celebration. Many other iconic brands are also discussing label and name changes.

Some brands have chosen a different path and decided to keep existing brand names. Trader Joe's, for example, had originally said it would stop using the designation Trader Jose's for its Mexican food and Trader Ming's for its Asian food. Ultimately, though, the chain said it didn't find the labels racist and decided to keep them in play.[3]

Deep understanding

How can brands decide the best course of action for branding or visual identity changes? A deep understanding of the wants, needs and perceptions of a brand's target audience is the first big step in the right direction. In a society that is becoming increasingly divided on a variety of fronts, a consumer-centric approach is essential to success. In an emotionally

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charged situation like this, concerning social justice and equality, brands need to be careful to avoid a misstep.

This means obtaining solid insights that speak to the behaviors and attitudes of individuals. Aggregate data has its place but right now brands need to uncover the subtleties of consumer sentiment and truly understand their expectations. Uncle Ben's, for example, conducted both traditional market research surveys and backed up this data with targeted focus groups in order to truly listen to its consumers.[4] Even in the midst of a pandemic, many options are available for brands to take the pulse of their core consumer, such as traditional online surveys, virtual focus groups, in-depth interviews, online journals or feedback via data collection apps and/or wearables.

The data might show that a change isn't necessary. Alienation is always a risk – some target consumers may feel disconnected when their brand shows a different face on the shelf. However, if the consumer-driven insights indicate that a label or brand shift is the best way to go – and can even open the door to a broader consumer base – there are ways to ease the transition. There are some best practices that brands can follow[5] when it comes to design and communications surrounding packaging updates.

Early and continuously

Before you do anything at all, bring in the voice of the consumer. Engage them early and continuously throughout the change process. Consumer input can happen as early as the brainstorming stage (where initial sketches are being developed), through optimization and, most importantly, validation. An effective way to assess consumer feedback is to look at both their System 1 (fast, automatic) and System 2 (slower, analytical) thinking. Using existing methodologies that test visual identity, you can dig into consumers' modes of thinking – both rational and irrational. Then, use that data to apply concise and prescriptive optimizations for the final design or refresh.

Maintaining some level of consistency is key. One rule of thumb is to keep the colors that your current consumer associates with your brand the same. Our research shows that regardless of category, even with a brand change or packaging design update, it is important to keep your logo colors as consistent[6] as possible. Color is one of your company's strongest brand cues for consumer recognition and association – especially at-shelf.

When updating a brand or visual identity system, keep it simple. Simplification can mean many things, but in this case, make sure important claims and messages are clearly visible and resonate with your target audience, while at the same time communicating all the applicable information needed. We have seen, during our work in this area, that a packaging update is a great time to also update your claims and claims also need to be tested. When consumers are making trade-offs at-shelf, it often comes down to the on-pack claims, so this is not an area to overlook.

Being creative is one thing but don't push the envelope too far, especially when it comes to modernizing your look. Be mindful of your target consumer and understand what design updates will work for them. A holistic qualitative and quantitative approach should be used to obtain consumer reactions to your product redesign. If your refresh or redesign is not far enough along in the process for a full-blown quantitative evaluation, your first step should include having live, qualitative conversations with potential consumers. Bring them in for initial design brainstorming sessions, allowing them to co-create with key stakeholders or, when multiple designs are already up for consideration, collaborate with consumers to identify and prioritize which top designs to carry into an optimization and validation phase.

From refining naming conventions to conducting rapid refinement qualitative sessions to revamping packaging designs (we do these virtually with a sketch artist!) and from quantitative optimization and validation, consumers can provide invaluable feedback throughout the entire process.

After the package is developed and hits

shelves, keep a pulse on your early buyers to make sure that the target consumer isn't changing (i.e., you haven't alienated your core consumer), that your product is still visually capturing attention at the shelf and that purchase dynamics haven't been negatively impacted – believe me, it's worth the disaster check. This can be done at-shelf in a real shopping environment with proprietary methodologies.

In the right way

Once you've decided to make the change it's critical to tell everyone – but you must tell them in the right way. Market research can also inform how to communicate your brand updates or visual identity changes to your core consumer base and beyond. The insights gathered will inform how you should communicate why the change is being made and how the change supports the core values of your company. Don't forget to reassure your long-time consumers that they can still expect the same product they know and love inside the packaging – the last thing a brand update or visual identity change should do is drive people away from your product.

Using the right market research approach, you can ensure your messaging and positioning are clear and compelling. By testing which messages are most motivating to your consumers, you can create a communication hierarchy that serves as a roadmap for successful messaging distribution and execution. There are developed, tried-and-true approaches to guide this methodology, using advanced analytical techniques to ensure proper positioning. By creating marketing communications using the information gathered from research, you can ensure the greatest resonance and acceptance with your audience.

At every step

In light of current events and calls for justice, equality and inclusion, some of the world's most iconic brands are examining their visual identities. These changes are significant and can be risky. One way, which we consider the best way, to minimize risk and engage with core audiences is to involve them at every step of the process.

Your consumers can give you critical insights when it comes to marketing communication, packaging and visual identity changes or claims testing. We have found that, regardless of how you get there, the consumer absolutely must be the guiding light for the changes. Obtain feedback early in the process, identify if a change is even necessary and, if it is, continue the feedback loop throughout all phases of the design process – through validation and launch. There are specific methodologies out there to help you gather this data and apply it to your business. Take advantage of them and put the consumer at the center of your decision making.

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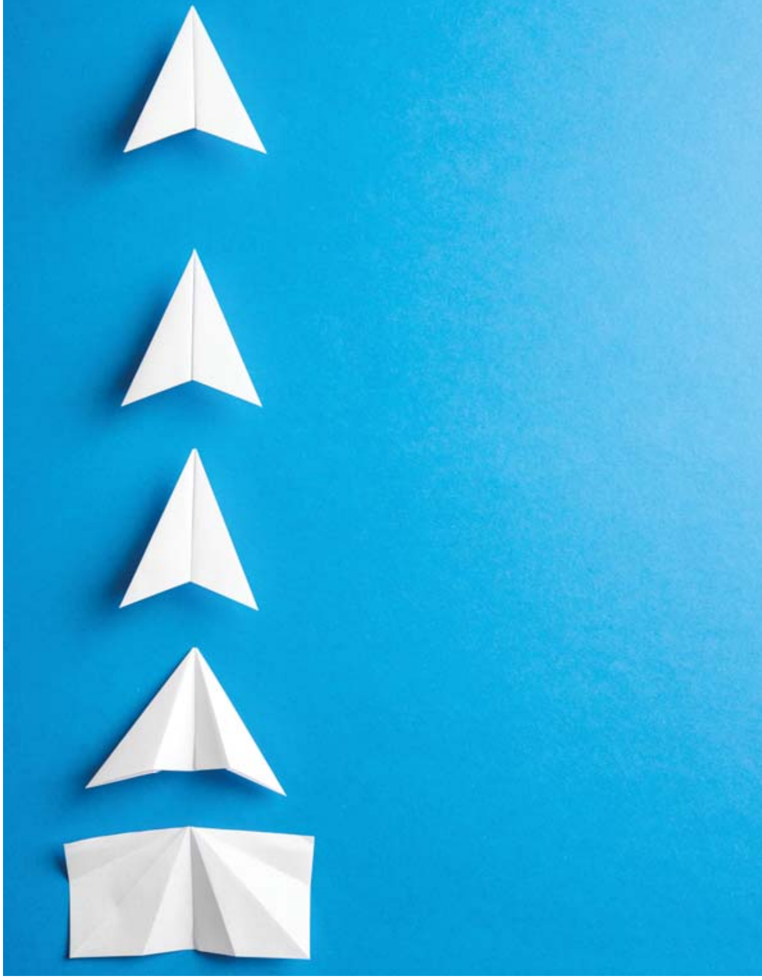

••• brand research

Maintain the momentum

Why CPG brands need to learn from shoppers' COVID-fueled shift to e-commerce

| By Michael Carlon

snapshot

Sales of many consumer goods are up during the pandemic. Michael Carlon argues that investing in UX will help companies keep products moving even in a post-COVID world.

The COVID-19 pandemic has significantly impacted the ways U.S. consumers are shopping for fast-moving consumer goods (or FMCGs as they are known in industry-speak). We've heard from many of our clients that, while store trips are down, basket sizes are up as shoppers are spreading out trips to reduce the risk of exposure to the virus. Additionally, as more meals are being made at home our food and beverage clients are experiencing unprecedented year-over-year growth. This dynamic is a double-edged sword; while sales are strong, evaluating performance at the same time next year versus the previous year may tell a somber story that growth rates couldn't be maintained. As a result, FMCGs are scrambling to find ways of making growth sustainable. Our firm believes one way of doing this is to invest in a retail channel driving growth: e-commerce.

While e-commerce has historically represented only a small percentage of a CPG brand's sales, there is no denying that it is a growth channel. Online U.S. CPG sales rose 35.4% in 2018, according to a report released in early 2019 by research firm IRI. That's a lot faster than the 3.4% growth in sales at food and beverage stores, including the supermarkets that sell most CPG products, according to the U.S. Department of Commerce. Of course, these statistics are all prior to the COVID-19 era. A poll from Inmar, a provider of data analytics solutions to retailers and manufacturers, found that nearly 80% of U.S. consumers reported shopping online for groceries after the COVID-19 outbreak.

Having explored e-commerce channels for leading manufacturers including Unilever, PepsiCo and Mondelez, we know that the biggest barrier of switching from traditional retail channels to digital ones is the fact that, oftentimes, when a consumer realizes they are out of a product – say, toothpaste – they can't wait one or two days for it to come from an online merchant; they need to replenish it immediately. As such, off to the store they go. However, two innovations in the e-commerce space address that reality head on: curbside pickup and same-day delivery.

If there's one universal truth we've heard from shoppers time and time again it's the importance of saving money. Hardcore Walmart shoppers will tell you it's the primary reason why they brave the store during popular shopping times. Walmart's everyday low prices and wide assortment of items, however, leads to a sometimes chaotic shopping experience that can include densely populated aisles, frequent out-of-stocks and long checkout lines – three things COVID-19 era shoppers

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want to avoid at all costs.

Over the past few years, however, Walmart has been investing in curbside pickup, giving shoppers the best of both worlds: the convenience of online ordering and the ability to pick up items from a physical location. The latter aspect is important to those who may not be able to be home to take delivery of an order or who want to be able to check over fresh items, such as meat and produce, before bringing them home. Additionally, shoppers who use this service tell us that it helps them save money by staying on budget as they are not tempted to impulse-buy. To them, it's all the benefits of shopping at a store like Walmart without any of the familiar hassles.

Same-day delivery is also becoming a reality for more and more online buyers. In September, Walmart announced the launch of Walmart+, a subscription service priced below that of rival Amazon Prime that promises same-day delivery of just about anything the retail giant sells – including groceries. Considering that there is a Walmart within 10 miles of 90% of U.S. households and social distancing will be a reality for the foreseeable future, we can expect shoppers who can be home for delivery to use this service for trips of all sizes (provided the order meets the $35 threshold).

It's worth noting, however, that at the onset of COVID, "click and collect" platforms (like Walmart Grocery's curbside pickup) and delivery services were not without their pitfalls. Many shoppers complained that they had very difficult times getting delivery or pickup slots. Furthermore, frequent out-of-stocks led to unwanted substitutions that fueled shopper frustrations. Ultimately, though, consumers were willing to trade-off frustration for safety and this kind of pressure-testing of these capabilities can give retailers and developers insights to optimize these services in the future.

It's also worth noting that e-commerce is winning over a sizable buying group that has traditionally eschewed the channel: elderly shoppers. In the past this segment put up a significant amount of resistance to buying everyday items online but given they are far more likely to get seriously ill from COVID-19 than younger shoppers, they are turning to their computers and devices in droves to shop for staple items. As such, this target must be considered when designing user experiences for these services.

Don't see the need

With this backdrop – a changing retail landscape in which a pandemic is driving shoppers to e-commerce channels for everyday items – FMCG companies concerned with maintaining year-over-year growth must invest in the online shopping user experience. The problem is, many marketers don't see the need to do so. As these CPG companies move away from brand.com-type sites and invest significant advertising dollars in online media and sponsored ads to drive shoppers to product detail pages on Amazon and other online retailers, marketers feel as if their investment in UX and UX research is unwarranted since brands have less control over these experiences. They couldn't be more wrong.

Consider brand stores on Amazon.com. Many of our clients have stopped using online media to drive visits to their brand.com websites, opting to drive them closer to the point of purchase on e-commerce sites like Amazon. In fact, in some advertising programs, Amazon requires brands to invest in its advertising services. These ads have to point somewhere and in the case of Amazon, they likely point to a product detail page on the retail giant's site. This is one of the final steps in the customer journey and it has just about everything a marketer needs to sell the shopper on the product including ratings and reviews, bullet points on product information, pack and product images and videos.

The structure of these pages and the content they include does more than just convert browsers into buyers. It also helps discoverability by optimizing search engine results. In the user experience research work we've conducted, we've found that the majority of people visiting e-commerce sites lean on the search features of those sites and use both brand-specific and category search terms to efficiently shop the store. Heat-mapping we've done through eye-tracking supports qualitative feedback we hear frequently from shoppers that suggests they value efficiency in the shopping experience and do not sift through more than one page of search results before either selecting a product or changing their search terms. As such, search engine optimization is paramount.

Aside from paying for better search results placement through sponsored ads, brands can improve their search results on e-commerce sites by optimizing their product detail pages and brand store pages. Doing so requires the marriage between content strategy and UX design best practices, which are both dependent on the foundational insights uncovered in user research. The answers to the following questions are paramount to developing both a content strategy and an impactful UX design:

- What need states influence online shopping behavior for these categories?
- How does that impact online retailer choice?
- How does a shopper build a basket online?
- What impacts basket size at the online point-of-purchase?
- What content do shoppers pay attention to on a product detail page?
- What are the barriers to conversion?
- What tools will help cross-sell our other categories online?
- How can the layout be optimized for shoppers with different degrees of technological sophistication?

Armed with these insights, UX designers can create an optimal user experience that will improve product detail page visits and conversions. In addition, manufacturers can bring these insights to retail clients as thought leadership – something that is expected of "category captains."

More than a short-term trend

The e-commerce channel has been growing for FMCG brands and this growth will continue in the post-COVID-19 era as shoppers realize the benefits the channel provides. However, we also know that while shoppers are willing to put up with a number of poor experiences now as a trade-off for increased safety, there is a prime opportunity for brands and retailers to reevaluate the online shopping experience to retain the shoppers they've won and make e-commerce growth more than a short-term trend. Marketers must optimize the user experience of their product detail pages and brand stores on e-commerce websites as this will lead to greater shopper delight and satisfaction. If they do, we believe that the unprecedented growth FMCG companies have experienced in the e-commerce channel can be sustained.

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Be paranoid, make checklists, don't assume

12 basic rules for better marketing research

| By Stephen Hellebusch

snapshot

Stephen Hellebusch offers up hard-won tips to help researchers deliver the best data possible.

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As a marketing researcher, one has a variety of business experiences. In fact, a nice feature of the profession is that one is exposed to many different industries and many different business issues over time. Having been both client-side and vendor/supplier-side in the course of a career, I've seen clear patterns emerge. Marketing researchers are trained to seek patterns.

Then there is Leroy Jethro Gibbs. As fans of the TV show NCIS know, he has a set of rules that casually apply in different situations. It occurred to me that MR folks might like to have a rule set, too. Feel free to add others that occur to you! The ones in this article are not necessarily original but resonate in a variety of MR and business situations.

1. The only stupid question is the one not asked. Actually, of course, there are stupid questions, and some are asked, some aren't. I still believe it is better to ask the question you have. This is the opposite of "Be quiet and people may think you are an idiot but speak up and you will remove all doubt." I have seen entire conversations turn completely when someone made a point that no one had considered. Better to contribute and, if your question is stupid, people will tell you. If you don't have enough stock with the others on the team to survive that, you may have other problems.

2. You cannot overcommunicate. With more ways to easily communicate available to us than ever before, people still assume that others know what they are thinking. It's probably human nature. It is simple to send an e-mail and copy all who might even remotely need the information you are providing. But people are still surprised. I enjoy speaking to people directly but e-mail is certainly useful when people are not available or the topic is not time-sensitive beyond a day. Better to err by giving someone information they do not need than by NOT giving them information they do need!

On the other hand, one person reviewing this article told me of people who actually do overcommunicate, copying everybody on most e-mails, even when the topic is completely irrelevant to the recipient. Likely, if an e-mail tsunami hits it can be handled in various ways. One colleague went on a two-week vacation, completely isolated from e-communications. When she returned, she had hundreds of e-mails waiting. How could she possibly deal with that number? She told me she read all the ones from people above her in the organization and all the ones from her direct reports and deleted all the rest. She figured if she deleted anything important, it would pop up again. Apparently, it worked. So, maybe you can overcommunicate. But even my reviewer agreed that the lack of communication is definitely the larger problem, so I'll stick by my rule.

3. Pay more attention to those things that can go wrong and cannot be fixed. With many projects, there are hundreds of little steps. Some will inevitably go wrong. What is important is to make sure that any that cannot be fixed are not the ones that go wrong. Often, these relate to time. If something is in the wrong place, it can be moved and get to the right place. If something is in the wrong place at the wrong time, a crucial element may be messed up.

4. If you can delay a decision until more information is available, do it. But don't delay forever. Sometimes, when there is an important decision to be made, there is anxiousness to make it and be done rather than agonize over it. If there is a need to have the issue decided with that timing, then so be it. Often, the pressure is internal. In that case, it may be possible to delay for a short time with no ill effect and may even provide a benefit. Sometimes additional information becomes available to help the decision maker. Sometimes, though less often, the situation resolves itself.

5. If a client wants to do something stupid, try to talk them out of it. If you can't, do it. This rule is not only for vendors/suppliers. Many internal service people have internal clients. There are times when clients want something specific, period. Sometimes the need is based on a misunderstanding of the data or situation and the possible decision options. Sometimes it is for other reasons that have nothing to do with any project – based in the politics of the situation. The service provider owes it to the client to try and recommend an approach that will succeed (if there is one) or explain why what is contemplated won't. That being done, the decision is with the client. (Of course, if the client's effort is to mislead or is unethical, that is a different kettle of fish!)

6. Be paranoid – expect that things will go wrong and plan accordingly. This rule has a corollary: Just because you're paranoid doesn't mean that they aren't out to get you. Basically, expect the worst – wear a belt and suspenders. If product needs to be at a facility for research on the tenth, overnight it, trackable, to arrive on the eighth, not the ninth. If you have made significant progress on a report, save it in two places. And, whatever else, don't forget Rule #2.

7. Everything takes longer than it does. In estimating project timing, most importantly when things can get to those who need them, we marketing researchers are often very good. Especially if we follow Rules #2 and #6. But, when it comes to actually writing a report, a questionnaire, a memo, etc., it seems I invariably underestimate the time it will take. That's where Rule #7 comes from – for me, everything takes longer than it does. This rule seems to apply in other situations, too, but which ones, exactly, are not clear – information searches are a leading candidate, though.

8. Read what you write. Reading what you, yourself, have written is really hard to do. One would not think so but after training many analysts in marketing research, it seems clear to me that hardly anyone reads what they write before sending documents (or e-mails). People I know who are very bright at times send written documents with the most galring erers. They would not do that if they red it. ;)

9. Always have a written game plan. Often, we are in a hurry and rush to "get it done." I have found that, when there is no written game plan, what gets done may or may not be what was intended. If I have to rush and get a project started NOW, I do. But then I write the game plan and share it with all to make sure we are on the same page. (Sometimes they even read it!) Better to stop after a minimal start than to blow the budget and then learn you had something wrong from the beginning!

10. Checklists can save your butt. In my first job as a trainee marketing research project director, I thought I had completed all that was needed to send a report out early. When I patted myself on the back for this feat, one of my colleagues asked if I had the four supplemental pieces needed as well. In a panic, I completed those and sent the report on time. Learning from my mistake, I made a checklist that I still use to make sure everything is included in each report. Since a checklist worked well in that situation, checklists became part of my "normal." Interestingly, they have been adopted as a quality method in hospital operating rooms, so checking things off can be a matter of life or death!

11. Ask the data questions. In my first job, we always "desk checked" data tables. Still not a bad idea as a quality control but with the disappearance of paper, I'm not sure how it would be done in large organizations. Once, completing a desk check, I knew everything added and the data were consistent from table to table. All was well, so I took it to my supervisor for approval to send to the client. She took one look and said, "It's wrong." I assured her it was not, since I had carefully checked everything. Then she pointed out that B plus C could not logically be higher than X but that was the case in my tables. Sure enough, I checked with the data tabulation specialists and learned something had been miscoded. Since then, after doing the normal desk-check tasks (do numbers really add; are subgroup bases consistent, etc.), I always stop and examine the data to make sure things are also logical.

12. Don't assume. Assume = make an ass, u, me. This one might also be described as "check your assumptions" or "question the assumptions." Doesn't hurt, might help. (Even thinking "what are we assuming" can be a help!)

Those are my 12; there are likely more – what are yours?

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••• the business of research

A joint effort

Clients and their research partners must work together to get quality data from panel research

| By Ron Sellers

snapshot

Ron Sellers outlines what you can do to make sure your panel respondents are delivering valid answers.

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Do you want to rely on a study where nearly half the respondents aren't giving you valid answers? Without the right steps, that's what you could be getting from your online panel research.

"Whoa – nearly half? That's a pretty wild claim," is probably your first thought, followed closely by, "I know online panel has some bad respondents, but we use CAPTCHA and eliminate speeders, so we should be good."

If only it were that simple...

Grey Matter Research (a consumer insights consultancy) and Harmon Research (a field agency) joined forces to determine just how many disengaged, fraudulent or otherwise bogus respondents are in a typical online panel study. The result is our report Still More Dirty Little Secrets of Online Panels (e-mail me for a copy). We tried to make the cover really attractive, because the content is pretty ugly for anyone who uses online panel research.

Don't get the notion this is an anti-panel screed or a promotion of some "proprietary" methodology over online panels. Every insights methodology has challenges and quality issues. Good researchers recognize this and do everything they can to reduce the problems and mitigate the challenges without throwing out the methodology. But from our observation, nowhere near enough researchers are taking the necessary steps to address the problems in online panel studies.

We fielded a questionnaire of about 10 minutes, with age and gender quotas, through five of the 10 largest U.S. opt-in consumer research panels. Nearly 2,000 panel members attempted to complete the questionnaire.

We used a variety of techniques to identify respondents who were giving poor-quality or fraudulent answers, such as: asking the same demographic question at the beginning and end of the questionnaire to compare responses; seeding the questionnaire with conflicting

statements in the same short grid question; including obviously fake brands in brand awareness and usage questions; CAPTCHA; overall completion length; tracking the time spent on individual questions; and reviewing open-end responses.

On this relatively brief, easy-to-complete questionnaire, we tossed out a whopping 46% of the responses as unacceptable.

Now, you're probably wondering, "Are they holding survey respondents to an impossible expectation of perfection?" The answer is no. We recognize people make honest mistakes. They'll hit the wrong response, misinterpret a question or get distracted on a particular screen. That's why my firm uses a multi-step quality process.

Certain problems result in immediate exclusion. An open-end response of "It's good – I like it" or "lkjkljkjljkjlk" to a question about who their favorite celebrity is strongly indicates a bogus respondent. So does spending two seconds on a question that should take a minimum of 20 seconds to read and answer.

For other quality concerns, we mark each problem in the data. For any respondent, one problem is ignored. Two problems gets them reviewed. Three problems gets them reviewed very carefully and four problems results in exclusion from the study.

You might quibble about the exact numbers in our approach (e.g., should someone be automatically excluded at three or five problems rather than four?), but you can't quibble with what we found: Among 1,909 respondents, we determined 1,029 to be valid, while 880 had problems so numerous or so obvious that we considered them to be bogus.

To demonstrate that the respondents we marked as bogus actually don't belong in our data, consider just five ways valid and bogus respondents differed:

- The proportion of our valid respondents who strongly feel the U.S. should strictly limit immigration was 28% but 62% among the bogus respondents. Worse, among the bogus respondents, 70% also strongly felt the U.S. should have no limits on immigration.
- The average reported monthly spending on medical care was $568 among our valid respondents but an astounding $9,069 among the bogus respondents.
- Brand awareness for Charity Navigator (a charity watchdog organization) was 15% among our valid respondents but 58% among the bogus respondents.
- While 9% of valid respondents felt very familiar with Regions (a Southern financial institution) the number was 24% among bogus respondents.
- When given a 200-word concept statement to read and evaluate, the average valid respondent spent 80 seconds reading it, while the average bogus respondent spent just 11 seconds (which comes out to about 18 words per second).

We have more examples in the full report but this should suffice to give you pause about the data quality you're getting. Just knowing brand familiarity for Regions was nearly three times higher among bogus respondents than among valid respondents should raise concerns about your last branding study. Bogus respondents also claimed brand familiarity that was 44% higher for Citibank, 29% higher for Bank of America and 250% higher for M&T Bank.

But wait (as you hear on infomercials) – there's more! Huntington Bank has branches in seven Midwestern states. Among valid respondents, 22% who claimed to be very familiar with Huntington Bank lived outside that seven-state footprint. This is not hard to believe, as those respondents may travel to one of Huntington's markets, live within one of its media markets (and see its advertising) or have previously lived in one of its markets. Much harder to swallow is that among the respondents we identified as bogus, 75% who claimed strong familiarity with the Huntington Bank brand lived outside that bank's service footprint.

Still think we just have unreasonable expectations for respondent quality?

Certain populations

While quality is a major concern for all panel studies, it's particularly an issue with certain populations. We have consistently found that men and younger respondents are substantially more problematic. In our study with Harmon Research, 46% of all respondents were identified as bogus but the numbers were 52% for males, 58% for non-whites (Black, Latino, Asian, Native American) and 62% for panelists under age 35.

Are these demographic groups just more likely to be fraudulent or disengaged? Not necessarily. We don't even know that a panelist claiming to be male, Black and 28 years old is actually any of those things. Panels tend to have greater difficulty getting members from these groups. It's likely that some bogus panelists are registering themselves as respondents who are more desirable for panels and more likely to get multiple opportunities to participate in studies. But if our research has you concerned about panel quality in a gen-pop study, how much more worried should you be if your target respondents are young men? It's likely that the majority of your respondents are bogus.

Harmon Research fields over 40,000 interviews per month through various online panels. President Joey Harmon estimates that of the various studies his company conducts for clients:

- 25% don't evaluate verbatims for bogus responses beyond obvious gibberish such as "kjkjkjkljljk"
- 50% don't eliminate straightliners (i.e., those who agree strongly with every statement or mark every brand as very familiar)
- 90% don't track the time spent on individual questions
- 90% don't evaluate numerical open-ends for obviously bad responses (e.g., answers of "12345" or "4444" to how much they spend each year on health care)
- 95% don't include fake brands in awareness or usage questions
- 95% don't take the approach of going line-by-line through the data to identify and eliminate bogus respondents

So we've identified three basic facts that are critical to your online panel research. One, almost half of the respondents in a typical study are bogus. (After completing the report we went back to some recent online panel studies Grey Matter Research completed for clients using many of these same techniques and found the 46% we eliminated to be pretty consistent with prior research.) Two, up to 95% of researchers aren't taking sufficient steps to identify and eliminate these bogus respondents. And three, failing to eliminate these bogus respondents from your studies can have a strong impact on your findings.

This leads to the obvious question: How do I fix this? Getting reliable data from online panels is not a one-step process. It involves work before, during and after the field.

Before the field

Good data collection starts well before the fieldwork. In any questionnaire, you must include multiple traps that will help you identify and weed out bogus respondents. Exactly how you do this will vary according to the content of your questionnaire. For example, you can't include fake brands if you're not asking brand awareness or use.

It's highly important that whatever traps you set aren't traps that bad respondents can easily avoid or that good respondents will accidentally fall into. Let's use the fake brands as an example. They must be names that aren't easily confused with real brands. If you're asking brand awareness for charitable organizations, it would be unwise to include World Poverty as a fake brand, because it's too easy for legitimate respondents to confuse this with World Concern, World Vision or others with a similar name. When we include outlandish brands such as the Ira Wozzler Foundation, we still often get 10-15% claiming to be very familiar with the organization. That makes it an effective trap.

Some traps are designed to disqualify respondents immediately from the questionnaire during the field process; others are designed to allow us to catch problems post-field in data quality checks.

During the field

A good field partner will be constantly monitoring your survey data for problem respondents. Harmon Research reviews data daily for speeders and bad open-end responses and its questionnaire programming allows us to employ techniques for catching bogus respondents. Grey Matter reviews the raw data multiple times throughout the field process, going through the data with our scoring system to identify respondents with multiple problems.

Working on quality while the study is in the field allows you to maintain good quota integrity and make sure things such as establishing separate cells with equal demographic distribution for monadic testing proceed smoothly.

After the field

Even with the efforts you put in while the fieldwork is in process, you'll still need to do a final review of the data on the respondents who were added after your last in-field check. We'll often exceed the final sample size, knowing we'll be tossing out bogus respondents in the final data file. Doing this allows us to stay on schedule, rather than having to go back into the field to get another 53 completes to replace the ones we eliminated in the final data check.

We also review what measures did and did not work so we can continually sharpen our ability to eliminate bad respondents and ensure more accurate data. This is how we've come to understand which methods perform well and which don't contribute much to the process.

For instance, we have consistently found that "red herring" questions (e.g., "Please mark the box all the way to the left") are not useful. They stand out from the other statements in a grid so they're easy for bogus respondents to spot and answer correctly as they speed through your questionnaire. Bots can be programmed to recognize these and respond correctly. On the other hand, we try to include at least one open-end that every respondent receives, as the quality of these responses is often a good indicator of the overall quality of the respondent.

Takes effort

Yes, this takes an awful lot of effort. But if you want reliable, accurate data in your studies, you cannot ignore the field and just leave it to your research agency or the panel companies. If you directly manage the data collection with a field agency or panel company, you must institute these measures as part of your questionnaire design, programming and data collection. Some companies will program your questionnaire and follow your field instructions very carefully; they're really an extension of you as the researcher. If you're not creating or requesting measures to ensure data quality, they can't do it for you.

If you work through a research agency, you need to have a frank discussion with them to understand exactly how they're ensuring your data quality. Are there traps in the questionnaires they craft for you? Are these traps uniquely designed for each project to fit the overall questionnaire and respondent profile or just boilerplate measures like the same red herring question tossed into every questionnaire? What measures did they use on your last study to identify and eliminate bogus respondents and just how many were eliminated? What testing did they use to arrive at those measures? If you can't get satisfactory answers, you need to look for someone who can explain exactly how they will proactively safeguard the quality of the data collection on your studies.

Consider one data collection vendor (who understandably wished to remain anonymous) speaking about their clients' lack of data quality efforts: "One end client goes in and looks at each open-end to make sure it makes sense. I don't see other end clients get that involved. We see others such as a large bank never review their data. Or a technology client; they do not review their data at all and the research agency doesn't share any raw data with them."

More steps

Online panel data collection (for better or for worse) is how much of quantitative research gets done today. If it's worth doing at all, it's worth doing right. Unfortunately, too many projects are allowing bogus respondents to influence the findings. As our investigation demonstrates, it's time to take more steps to ensure valid, reliable, usable data.

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••• the business of research

Working in parallel

7 ways to ensure your study doesn't get lost in translation

| By Jill Bishop

snapshot

Jill Bishop offers tips on partnering with translation firms to take marketing research global.

One of the most exciting and rewarding areas of market research is the opportunity to capture diverse cultural perspectives via multilingual research. But it's important to have the right tools in your suitcase when you head off into the unknown – even if it your trip is virtual.

If you're reading this, you probably already know that thinking of translation services as an afterthought is a no-no but it bears repeating. The reality is that our industry continues to diversify and the requests for multilingual research are on the rise. As a network of language and culture investigators, our firm has learned a thing or two about supporting multilingual market research needs over the years. Before you start your next project, review these seven tips to ensure your data quality doesn't get lost in translation.

1. Allow enough time. When you're doing a study that involves other countries or languages, don't make the mistake of waiting until the last minute to think about translation and transcription services. Partnering with a team of linguists from the beginning ensures you'll get the most out of your research without adding extra items to your to-do list.

It's best to consider translation services as an integral part of your project from the very start. This gives you the chance to build in adequate translation time. Whenever possible, engage with a universal translation services partner in the early stages of your project planning – the earlier, the better!

Specifically, when doing research in a foreign country, keep in mind that whatever you're doing in your native language, you ALSO need to have done parallel in the target language(s).

So, for example, typically for any research project, you're going to need: a screener; a qualitative guide or quantitative questionnaire; and probably stimulus materials, transcripts, subtitles for video, and a report.

www.quirks.com/articles/2021/20210115.aspx

For each of these materials, you'll want to take into account the time required for getting them done (and done WELL) in that second language (or many times, multiple languages).

Pro tip: Lead-time varies by volume and project. Be sure you account for the additional time appropriately. It's not just the original, one-time translation of material that you need to consider. Each of these translations will need to be checked (and sometimes rechecked) – just like you will be checking (and rechecking) all of these materials in the original English language.

2. Allow enough budget. Similarly, you'll want to make sure you've accounted for the extra budget needed to translate your research materials into the target language. It's downright dangerous to discount the importance of quality translation. Just think about how hard you work to get your screening qualifications clarified in one language! And think about the intricacies of a qualitative discussion guide or an online quantitative questionnaire. These tools can be complicated in one language, let alone two or more.

Allowing enough time to evaluate suppliers (see Rule 1) and being clear with your request (see Rule 3) will both help to ensure that you have the information you need to secure the budget for the level of translation.

Pro tip: One cost-saving trick to keep in mind when working in foreign languages is to finalize your materials in your source language first (presumably English) before moving into the translation stage for any of those materials. This strategy, though it requires discipline, will save you money, time and aggravation.

3. Be specific with your request. In order to get the best quality and cost efficiencies with translation, you need to be clear on what you are asking your translator, or linguist, to do. What type of research material is it: screener, qualitative guide, quantitative questionnaire, transcript, report, etc.?

About how long is the document you're having translated and in what format do you need it delivered? For example, if you're having a screener translated, as a guideline, think about the average length of a screener for the type of project you are working on. Regardless of which type of research material you are having translated, providing your translation services partner with a sample document is always helpful, for both cost estimation and definition of deliverables.

Ditto for the desired output. Not only is it helpful for alignment with the translator but this will save you time as you move through your own documentation and reporting process.

One important point to consider is how refined you need the output to be. Sometimes, having a first pass of what was said is enough (in other words, what the translator provides to you and your research team for internal analysis and report writing may not necessarily need to be end-client ready). Having clarity on this point will also help with securing a better cost estimate.

Pro tip: Don't forget to take into account time zones when you're planning international work. If you give your deadlines in your time zone, that's fine, but you might get better results if you make sure you're aligned with your translator in terms of what that deadline means in their time zone. Working with a vendor who sources an in-region linguist for you can help alleviate the pressure of this frustration.

4. Check your mind-set: It's never "just translation." Nuance is everything when it comes to translation. Think about how hard you work to use the correct words in your own language. How much effort you put into the specificity of what you are trying to explore on research projects. How you make sure to ask the questions so they do not lead respondents (or somehow otherwise bias them).

When you are rendering research materials in another language, many things must be taken into account. It's not just the words. It's the nuances, the tone, an ear for the cultural and linguistic understanding and intention of the original language. And how that should be interpreted in the target language. Same is true for the flipside – the nuances of the respondents' answers.

Even in native English the words can be different from one English-speaking country to the next, e.g., "boot" in British English compared to "trunk" in American English. Now let's expand that to include different countries – many of which have more than one dialect. Each language can have different implications in different verticals – legal, financial and health care come to mind as being particularly challenging.

All of these considerations should be taken into account when trying to approximate research materials into foreign languages, since the goal is to have your words resonate and engage your research participants meaningfully, no matter where they live or what language they may speak.

5. Check your mind-set, part two: Just because they can speak a language doesn't mean they'll be a good translator. In the never-ending quest to cut corners (a.k.a. the race to faster, less expensive insights), it is tempting to hope that a Spanish-speaking employee (a specialist in accounting) might be able to bang out the translation for your upcoming research study on automobiles in South America.

See it this way: It's a tall order to think just because someone speaks English, they'll be able to write a research screener or a quantitative questionnaire.

Utilizing outsourcing to free up your native-speaking accountant (or better yet, your native speaking research team members) means their time will be better used – focused on the data.

A word about machine translation: It's definitely getting better over time. Some languages are more accurately machine-translated than others and, depending on what you are trying to translate, it could serve your needs very well – for example, something that is highly repetitive or lists of words that can be easily double-checked.

But the minute you step into something that requires more linguistic accuracy and cultural nuance (e.g., screeners, questionnaires, positioning statements), there can be a steep drop-off in terms of quality. Just looking at an English to English machine transcription of an audio recording will give you an idea of how easily things can go awry – and then imagine English to Chinese! Your translation partner should help you identify if your project is right for machine translation.

Is all research equal? (We're hearing you say "NO.") Neither is linguistic and cultural interpretation.

Pro tip: Similarly, when thinking of non-native-English-speaking research participants (i.e., Russian, Vietnamese, Hispanic, etc.), don't expect that just because someone can speak English as a second language they will be able to express themselves fully in a research situation or feel comfortable doing so.

6. Streamline your translation process. You can hire translators directly or you can work with an agency but it's important to have the right people involved in your project and to streamline the process. If you send a finished screener in English (that you have written or at least approved) directly to a translator (one who you know and who speaks the target language as their native language), you would be able to give your instructions directly to that native-speaking translator, which is great. However, sourcing and managing a team of linguists can take a lot of your time and resources, especially if you are looking at large projects and in multiple languages.

Another way to translate your materials is by working with an agency. Professional translation agencies usually work with a network of language experts that have been pre-vetted and they're able to determine the best linguist for the job based on native language, region and industry expertise. One potential scenario is for you to work with one or two dedicated contacts at the agency who do the heavy lifting and communicate directly with the translators about your project specs.

7. Seek out a good, long-term partnership. Whenever possible (especially if you have ongoing needs for a particular language or languages), seek to establish a long-term relationship with a partner for how you're going to get that work done. The continuous learning that results comes in handy when working under the pressure of deadlines and budget constraints, since your translation services partner can help you develop customized solutions that fit your needs.

Of course, you can consider multiple relationships but a "one-stop-shop" also has the advantage of minimizing the number of people involved (see Rule 6), as well as creating synergies in terms of understanding time and budget expectations. It can also result in cost savings in the long term.

Valued as a priority

As the race continues towards faster data, quality can't be left in the dust. While many factors contribute to the outcomes of a project, translation and transcription services need to be valued as a priority.

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CALENDAR OF EVENTS

••• can't-miss activities

Quirk's Media will host Webinar Wednesday on **January 20**. Visit quirks.com/events/webinar-wednesday-1-20-21.

Quirk's Media will host Webinar Wednesday on **February 17**. Visit quirks.com/events/webinar-wednesday-2-17-21.

The 2021 Quirk's Event Virtual – Global will be held on **February 23-25**. Visit thequirksevent.com.

World Business Research will hold its eTail Virtual Summit and Expo on **February 23-25**. Visit bit.ly/3n6tnjn.

The Merlien Institute will hold its 2021 QUAL 360 EU event on **March 3-5** as a virtual event. Visit eu.qual360.com.

The Insights Association will hold its Qual Event on **March 9-10** as a virtual event. Visit www.insightsassociation.org.

Quirk's Media will host Webinar Wednesday on **March 24**. Visit quirks.com/events/webinar-wednesday-3-24-21.

Intellus will hold its 2021 Intellus Worldwide Summit online on **April 1**. Visit www.intellus.org/Events-Webinars/SummitVE-2021.

Intellus will hold its 2021 Intellus Worldwide Summit online on **April 8**. Visit www.intellus.org/Events-Webinars/SummitVE-2021.

succeet will hold the virtual pillar of succeet21 on **April 14-16**. Visit www.succeet.de.

Intellus will hold its 2021 Intellus Worldwide Summit online on **April 15**. Visit www.intellus.org/Events-Webinars/SummitVE-2021.

The Merlien Institute will hold its 2021 MRMW EU event on **April 20-21** as a virtual event. Visit na.mrmw.net.

Quirk's Media will host Webinar Wednesday on **April 21**. Visit quirks.com/events/webinar-wednesday-4-21-21.

succeet will hold the in-person pillar of succeet21 on **April 21-22** at the MOC in **Munich**. Visit www.succeet.de.

Intellus will hold its 2021 Intellus Worldwide Summit online on **April 22**. Visit www.intellus.org/Events-Webinars/SummitVE-2021.

Intellus will hold its 2021 Intellus Worldwide Summit online on **April 29**. Visit www.intellus.org/Events-Webinars/SummitVE-2021.

The Pharma Market Research Conference USA will be held on **May 12-13** in **Newark, N.J.** Visit usa.pharmamarketresearchconference.com.

The Insights Association will hold its NEXT 2021 event as a virtual conference on **May 18-19**.

Quirk's Media will host Webinar Wednesday on **May 26**. Visit quirks.com/events/webinar-wednesday-5-26-21.

The Merlien Institute will hold its 2021 QUAL 360 NA event on **June 16-17** in Washington D.C. and virtually. Visit na.qual360.com.

Quirk's Media will host Webinar Wednesday on **June 23**. Visit quirks.com/events/webinar-wednesday-6-23-21.

The 2021 Quirk's Event – London will be held on **July 20-21** at the InterContinental London O2 in **London**. Visit www.thequirksevent.com.

Quirk's Media will host Webinar Wednesday on **July 28**. Visit quirks.com/events/webinar-wednesday-7-28-21.

The Insights Association will hold the X Event 2021 on **August 3-4**. Visit www.insightsassociation.org.

The 2021 Quirk's Event – New York will be held on **August 17-18** at the Javits Center in **New York**. Visit www.thequirksevent.com.

Quirk's Media will host Webinar Wednesday on **September 1**. Visit quirks.com/events/webinar-wednesday-9-1-21.

Quirk's Media will host Webinar Wednesday on **September 29**. Visit quirks.com/events/webinar-wednesday-9-29-21.

GreenBook will hold its 2021 IIEX North America event on **October 5-6** in Austin. Visit events.greenbook.org/iiex-north-america.

The Insights Association with hold CRC 2021 on **October 19-21**. Visit www.insightsassociation.org.

The Merlien Institute will hold its 2021 MRMW EU event on **October 20-21** in Berlin and online. Visit eu.mrmw.net.

The 2021 Quirk's Event – Chicago will be held on **December 1-2** at the **Hyatt Chicago in Chicago**. Visit www.thequirksevent.com.

Event details as of December 15, 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.

special advertising section

16 TOP TELEPHONE RESEARCH COMPANIES

In an age where most everyone is accessible via phone, telephone interviewing can provide companies with a wide pool of respondents while offering a more personal respondent experience. Companies that specialize in this method are not only equipped with the tools and technology to reach respondents effectively but they also offer a broad range of expertise to meet your research needs.

The following companies are ready to assist with your telephone interviewing needs, whether you require one-time services or are looking for a partner for an ongoing project. From quantitative to qualitative, these companies will help you reach niche audiences in a range of languages.

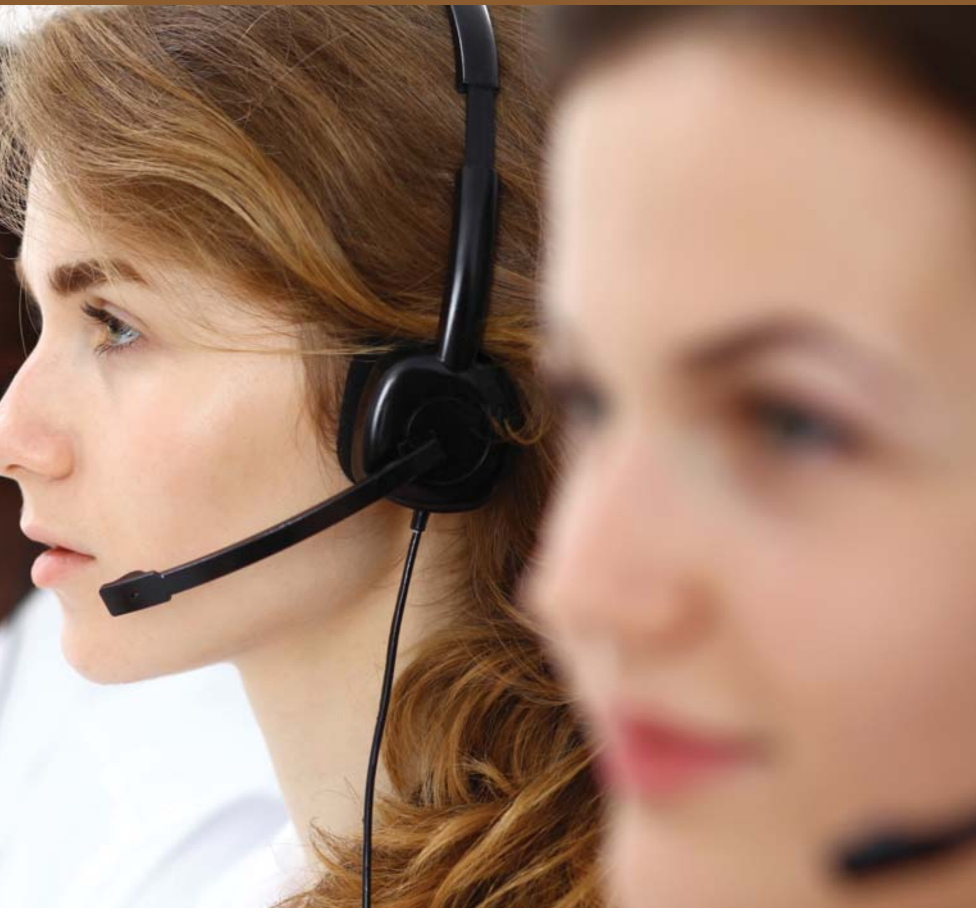
quirks.com/articles/2021/20210133.aspx

askia automating insight

Askia

Founded 1996 | 50 employees
Jérôme Sopoçko, Founder and
Patrick George Lassale, Founder

Askia is a leading supplier of technology to MR agencies around the world. Our telephone solutions are widely used and recommended by agencies of all sizes and include switch-mode management to (and from) web surveys, integrated dialing, remote listen-in, advanced quota and sample management, recording and automated transcription and the support of remote interviewers



and both inbound and outbound calls. There is no limit to what you can do with Askia!

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www.askia.com
www.blog.askia.com

The Blackstone Group

Founded 1987 | 50 employees
Ashref Hashim, CEO

The Blackstone Group is a marketing insights and research firm with more than 30 years of experience across a range of industries including energy, finance, pharmaceutical/medical and technology. We specialize in global research covering most countries' native languages. We are pioneers in multi-mode methodologies, offering a full range of research options for qualitative and quantitative studies including 100 CATI stations as well as online and in-person interviews. We have extensive online panel resources for accessing consumers and B2B decision makers. We are highly responsive from initial proposal through 24/7 attention to projects that deliver quality results with quick turnaround at competitive pricing.

Phone 1-312-419-0400
bgglobal.com

Clear Insights Group

Founded 2014 | 350 employees
Jeffrey Welch, CEO

Clear Insights provides survey research data collection services to discriminating organizations throughout North America.
Using the most advanced technologies, we provide our clients with the advantages they have come to expect when partnering with us to gather insights through survey research. We believe the best services are delivered when providers work as partners with their clients. Our aim is to provide responsive service and quality deliverables and actively contribute to your success, even in ways you do not envision. Whether a one-time ad hoc project or ongoing programs, our commitment is reflected in our work behavior every day.

E-mail contact@clearinsightsgroup.com
www.clearinsightsgroup.com

Confirmit

Founded 1996
Kyle Ferguson, CEO

Confirmit's solutions are built by insights professionals for insights professionals. Market research, customer experience and employee engagement experts around the world rely on our solutions to turn insight into stories that fuel action. With Confirmit CATI, clients manage all aspects of your telephone interviewing projects, including quotas to make the most from your sample, and ensure that interviewer time is utilized effectively. This comprehensive solution also makes it easy to manage quality and productivity with a wide range of automated dialer options, real-time dashboards, reports and a variety of quality-control features such as live monitoring and recorded interview playback.

Phone 1-800-864-5266
www.confirmit.com

Gnosis Partners

Founded 2012 | 118 employees
Sandeep Kumar, CEO

With nearly a decade of rich experience in conducting telephonic interviews with niche audiences in over 30 foreign languages across the globe, Gnosis Partners by far has been one of the leading organizations whose sole aim is to provide best-in-class fieldwork services to clients ranging from independent boutique research firms to big consulting firms worldwide. Our more than 100 CATI workstations and experienced moderating team supports multilingual global research projects. We utilize "best-in-breed" survey tools! Whatever your market research needs may be, our conviction to deliver knowledge beyond just collecting data is what makes us a unique and trustworthy business partner.

Phone 91-991-020-4052
www.gnosispartners.com

I/H/R Research Group

Founded 1976
Steve Clark, CEO

I/H/R Research Group specializes in providing the highest-quality marketing research data collection using both traditional and online methodologies. Our experienced CATI team delivers representative best-in-class data across a variety of categories including consumer, political polling, CSAT, NPS, B2B, health care, tracking, multilingual, mixed-mode, qualitative recruiting and executive interviewing. Our state-of-the-art Las Vegas call center has 52 stations complete with live digital call monitoring/recording on all stations to ensure quality. In response to COVID-19, we now operate a fully remote interviewing team as well. We support all interviewing software packages or platforms. We are experts in conducting low-incidence studies using pure probability RDD sampling to maximize representation and adhere to traditional AAPOR/government-based data collection standards. We offer fully TCPA-compliant wireless data collection and leverage top-quality sampling from sister company Scientific Telephone Samples to ensure representative sampling methodology. Our seasoned team, high quality standards and affordable CPI for both landline and wireless interviews distinguishes us from the rest.

Corporate Office/Sales 1-714-368-1884
Call Center 1-702-734-0757
E-mail info@ihr-research.com
www.ihr-research.com

Information Specialist Group

Founded 1996 | 12 management employees; capacity for 55 phone interviewers
Bob McGarry Jr., CEO

Information Specialists Group offers a complete range of research services – from consultation and customized study design to data collection, analysis and reporting – for virtually any type or size of quantitative or qualitative study. Our in-house data collection capabilities include phone recruiting, phone surveying, phone recruit-to-web surveys and online programming and hosting, as well as live intercept interviewing. Well-known for more than 25 years of experience reaching the hardest-to-find and hardest-to-engage B2B and B2C audiences, some industries we routinely serve include agriculture, financial services, health care, industrial manufacturing, legal and medical technology. Clients appreciate exceptional service and our turnkey ability to support critical decision-making with actionable intelligence.

Phone 1-800-279-5314 or 1-952-941-1600
www.isgmn.com

Ironwood Insights Group LLC

Founded 2017 | 320 employees
Brad Larson, Founder and CEO

Ironwood Insights Group leads the market research industry 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 telephone, online and multimodal data collection services. Our call centers use the latest technology with cloud-based servers and dialers for increased production, quality and security. We are HIPAA- and TCPA-compliant and maintain strict security and confidentiality controls. Our full quantitative data collection services include consultation, questionnaire design, sample sourcing, survey fielding, data processing, data analysis and reporting. Our qualitative methodologies include traditional focus groups, online focus groups, online bulletin boards and in-depth interviews. We are dedicated to providing our clients the best research solutions at reasonable rates. Call or e-mail today for “Insights that provide clarity and drive action.”

Phone 1-801-569-0107 ext. 2110
E-mail info@ironwoodinsights.com
www.ironwoodinsights.com

Just The Facts Inc.

Founded 1994
Bruce Tincknell, Managing Director

Just The Facts Inc. has 30 years of strategic B2C/B2B phone survey expertise. Our client-centric mind-set drives all actions, communications and attention to detail. Quality, well-trained interviewers also set us apart from typical survey firms. JTF meticulously manages projects, attentively listening and understanding client objectives, questionnaire design, programming, sample procurement, QC, fielding, post-field QC and a range of deliverable options. When other survey suppliers don’t understand critical nuances of your needs, then their low-price research is time-consuming and costly. Conducting quality phone research means having a strategic partner that effectively guides important assignments, delivering key insights. Our extensive survey experience encompasses voice of the customer, satisfaction, decision-making and evaluating products and services, competitors and more. Let’s discuss your specific needs, ensuring your initiatives are effectively executed. Call for free consultation.

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

Logit Group Inc.

Founded 1997 | 250+ employees
Sam Pisani, Managing Partner and
Anthony Molinaro, Managing Partner


The Logit Group is an innovative, technology-driven research execution company. We have consumer, B2B, medical and multilingual capabilities that cover North America, Europe, Asia and South America. With over 300 seats, we can target unique and niche audiences. Through IVR and advanced sampling services, we can also gain access to mobile-only audiences and leverage proprietary technology to replicate a perfect interview every time. We routinely conduct studies in more than 40 languages including Spanish, French, German, Mandarin, Cantonese, Hindi, Urdu and Punjabi. Contact us to learn more about how we can help you with your next project.

Phone 1-866-84-LOGIT
logitgroup.com/catib2c

Murray Hill National

Founded 2013 | 29 employees
Susan Owens, President and 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 eight 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!

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

Perspective Research Services

Founded 1996 | 15 full-time; 1,200+ part-time employees
Ivor Stocker, Chairman

Perspective Research Services are leading offline data collection specialists. With over 20 years of experience, telephone interviewing is at the heart of Perspective's heritage and remains a key specialism we offer and highly recommend for personally engaged data. We take pride in retaining traditional best practices whilst embracing new technologies and methodologies. This includes combining CATI with online panels for a truly representative capture of target populations, often making studies more viable within clients' budgets, and where there may be restricted timings, the use of stimulus midway through a CATI interview, which is great for ad effectiveness and ad development research.

Phone 44-0-207-490-5944
perspectivemr.co.uk

Precision Opinion Inc.

Founded 1996 | 923 employees
Matt McCoy, Senior Vice President

Precision Opinion Inc. is a leader in quantitative market research data collection. Based out of Las Vegas, Precision Opinion operates out of two new state-of-the-art call centers with a total of 700 CATI stations utilizing the VOXCO dialing platform. In addition, Precision provides data collection through its proprietary PrecisionSMS, a leader in text-to-web surveying, along with encompassing multimode capabilities for phone, SMS, online and IVR. Precision Opinion's size and management expertise allows it to work on large, complex social science and public policy projects along with political and consumer research. As a bespoke market research agency, Precision Opinion prides itself on the ability to create customized data collection and reporting capabilities for clients of all sizes. The company mission is to deliver unimpeachable data on time, within budget and according to client specifications. We look to partner with our clients to uncover the insights that drive success. Contact Precision Opinion today to start the conversation – sales@PrecisionOpinion.com.

Phone 1-702-727-3773
precisionopinion.com

ReconMR

Founded 1995 | 1,000+ employees
Lyle Durbin, CEO

Reconnaissance Market Research (ReconMR) specializes in telephone and multimode data collection for public opinion, political polling, social science, B2B and consumer opinions. We have more than 25 years of experience delivering quality, representative data with more than 1,500 trained interviewers, including bilingual staff. Our 700 TCPA-compliant U.S. CATI stations in San Marcos, Houston, Bryan, San Antonio and Corpus Christi, Texas, utilize Voxco's enterprise-level multimode platform and an advanced telephony networking system. ReconMR's affiliate company CRI is MBE- and HUB-certified.

Phone 1-512-757-8116
www.reconmr.com

ReRez

Founded 2002 | 10 employees
Debbie Peternana, CEO

ReRez – Simplifying Complexity! As online panel specialists and methodology consultants with access to more than 50 online panels and custom databases (phone), ReRez has carved out a niche in the industry by completing difficult research studies worldwide. Segments include consumer, B2B, execs and C-level, all company revenue levels including $2 billion+, risk and fraud DMs, IT and technology, financial including AUM of $50 million+, high net worth, unacculturated Hispanics, ethnic, youth, patients (stage 3 and 4 cancer, hemophilia A and B, cystic fibrosis and more). ReRez specializes in quantitative research including online and mixed-mode, interviewer-administered (shared screen capability, show visuals), programming, data collection, sample only. If We Can't Do It, It Cannot Be Done! Get in touch and never turn down a study again!

Phone 1-972-795-8525
www.rerez.com

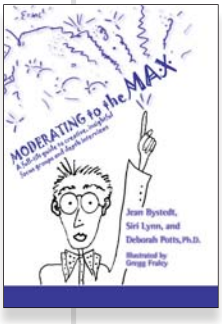
Telepoll Market Research

Founded 1990 | 75 employees
Christine Schmakies, Director of Operations

Dial It Up! Telepoll Market Research is a dedicated 60-station telephone data collection firm. With 30 years of experience, our proven and proprietary data collection methods are second to none. We've managed virtually every type of research. Telepoll's satisfied clients include financial services and retail companies, marketing and brand management firms, groups, associations, political parties and governments. From customer satisfaction to challenging C-level studies, Telepoll tailors itself to each and every client and their respective campaigns and delivers on even the most complex and unique projects. Telepoll proactively manages and delivers projects with quality and precise data.

Phone 1-416-977-0608 ext. 222
www.telepoll.net

ESSENTIAL READING FOR RESEARCH PROFESSIONALS

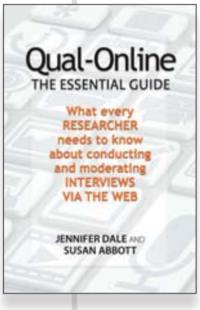


Moderating to the Max

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



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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.

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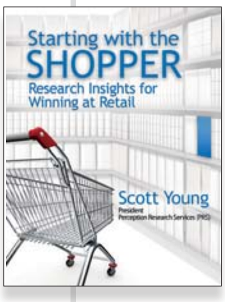
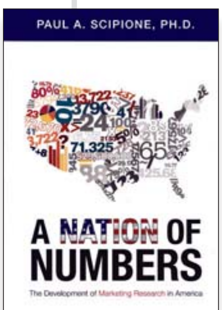


Starting with the Shopper

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

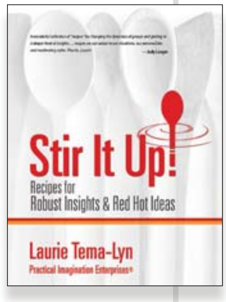
The Development of Marketing Research in America

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

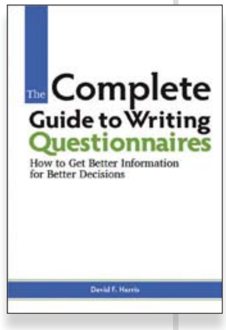


From time to time, every moderator, meeting chairman, or in-depth interviewer needs fresh ideas to jazz up a tired group or reenergize a flagging meeting. Here are 50 fresh ideas for exercises in an easy-to-use cookbook format. Organized by category, from Ice Breakers to Idea Developers each "recipe" (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

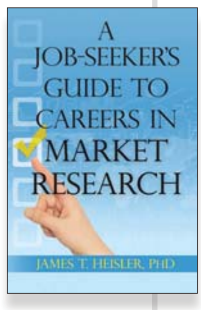


A comprehensive framework for creating questionnaires from planning research to support decision-making, conducting qualitative research, and planning the questionnaire before you begin writing questions, with guidelines to make questions clear, answerable, easy, and unbiased for the three most common 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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10 minutes with...

Nathan Noertker

Shopper Outperformance Team Lead – Health, RB

"COVID has been a time to increase our research, to increase our shopper touchpoints in order to understand challenges and opportunities."

You began your career in the grocery industry as a bagger/cart attendant. How does this starting point impact your current role at RB?

Having worked in the stores for almost 10 years, I gained invaluable experience that has served me very well in my current role. I had the opportunity to witness the challenges shoppers face daily, the difficulties store personnel face trying to execute an objective that is not operationally feasible and a true understanding of what is most important during critical holiday periods throughout the year … customer service!

As a bagger and then a cashier, I would watch as a mother had to choose what items to keep on her order and which ones to put back because her budget wouldn't allow her to get everything her family needed. This translated to a better understanding of why, in part, online is doing so well with budget-conscious shoppers during COVID-19, and why the savings tools offered by retailers/manufacturers are needed and well utilized.

As a deli/bakery manager, interacting with someone selecting a cake – seeing the importance they placed on getting just the right details for their loved one for that special moment – has helped me understand how key shopping missions/trips can be very powerful and emotional when their expectations aren't met. Fast forward to today and my work in OTC/health, these shopping missions can be even more emotional when a child or loved one is ill and the shopper is trying to determine the best product to help with this situation. The shelf can be overwhelming and confusing at a time when the shopping experience is critical. How do I make this better?

How has the COVID-19 pandemic changed the way you conduct research?

We were already on the journey of increased speed to insights while driving quality information, and COVID has only enhanced that mission. We have continued to push for even faster research while maintaining the quality we expect. Our methodologies have included digital/mobile studies, enhanced surveys with panel data deep dives and an increased focus on more DIY. We've also leveraged our vendor partners in the industry even more than before, and the insights community has really stepped up! From webinars to whitepapers, we have been utilizing each piece of information we can obtain. Not just for our own use in SI, but to ensure our leadership and field resources are fully equipped for retailer conversations and key decisions.

COVID has been a time to increase our research, to increase our shopper touchpoints in order to understand challenges and opportunities. We didn't pull back, we pushed forward.

Do you have any tips for researchers trying to navigate an influx of COVID-19-related data?

We have found that utilizing multiple touchpoints/methodologies has provided us the most well-rounded view of the current situation. Don't rely on one study or one webinar. The power in insights has been driven by the partnership of all of them.

Read the full interview at www.quirks.com/articles/2021/20210122.aspx.