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NOW AND IN THE FUTURE

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PLUS

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Lessons from Naomi Henderson

Best practices in B2B thought leadership

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Quirk's Marketing Research Review
March/April 2022
Volume XXXVI Number 2
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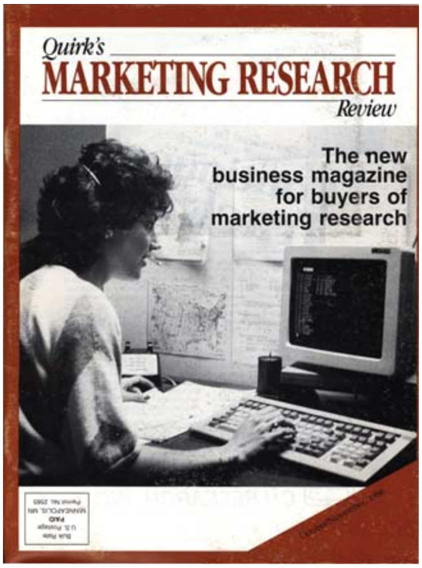
••• 35 years

We missed our own birthday!

In October 2021, amid the excitement of the return to in-person events, Quirk's turned 35.

Our focus for the past 35 years – and 7,600+ articles – has been on practical, actionable and objective content written for and by researchers. In fact, Quirk's has archived every full issue since our first one in 1986. We encourage you to check out the PDFs and see how far the industry has come – from article topics to cover image choices and research firm ads!

Visit www.quirks.com/magazine-issues, select one of our first issues and enjoy a blast from the past!



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6 topics insights pros are pondering in 2022
https://bit.ly/3JeqRlS

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https://bit.ly/3HOtyu0

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••• leisure research

Free breakfast tops travelers' list of amenities

As more and more Americans hit the road to travel this summer, the No. 1 value amenity they look for when booking a hotel is free breakfast, according to a survey commissioned by Hilton.

In the OnePoll survey of 2,000 Americans from January 3- 5, 2022, 60 percent said they are currently planning for spring and summer travel. Seventy-three percent of those surveyed cited unexpected food costs as a major pain point when on the road and 40% of Americans have stayed at a hotel just to avoid cooking breakfast altogether.

Ninety-one percent of families pay an average of up to $50 on breakfast alone, with 82% reporting they prefer buffets with options to satisfy the entire family. Only 19% of those surveyed say they have time to eat breakfast daily, even though 79% feel more productive after eating it in the morning.

When asked what their choice would be if they could have one breakfast item for the rest of their lives, respondents said pancakes, followed by toast and waffles – with bacon topping the list as America's favorite breakfast side.

••• consumer psychology

Secrets are told to punish the secret-holder

According to a new study by researchers at Arizona State University and Columbia University, when we learn another person's secret that breaks our own moral code, we're more willing to divulge that secret to "punish" the secret-holder, according to Jessica Salerno, an associate professor of psychology in the School of Social and Behavioral Sciences at Arizona State University.

In "Morality, Punishment and Revealing Other People's Secrets," Salerno and her co-author, Michael Slepian of Columbia University, found a consistent trend in how often secrets were divulged and some of the motivations as to why they were divulged.

The role of punishment is a key in the divulging of a secret. If the person who was confided in thinks the person who holds the secret has already been punished, then they are less motivated to divulge the secret. Remove the punishment, however, and then people are more motivated to divulge the secret to fulfill that need to see them punished, Salerno says.

The research, which is based on a series of nine studies that asked participants how often they decide it is appropriate to reveal someone else's secrets and what their motivations were behind those decisions, is published in the early online issue of the Journal of Personality and Social Psychology.

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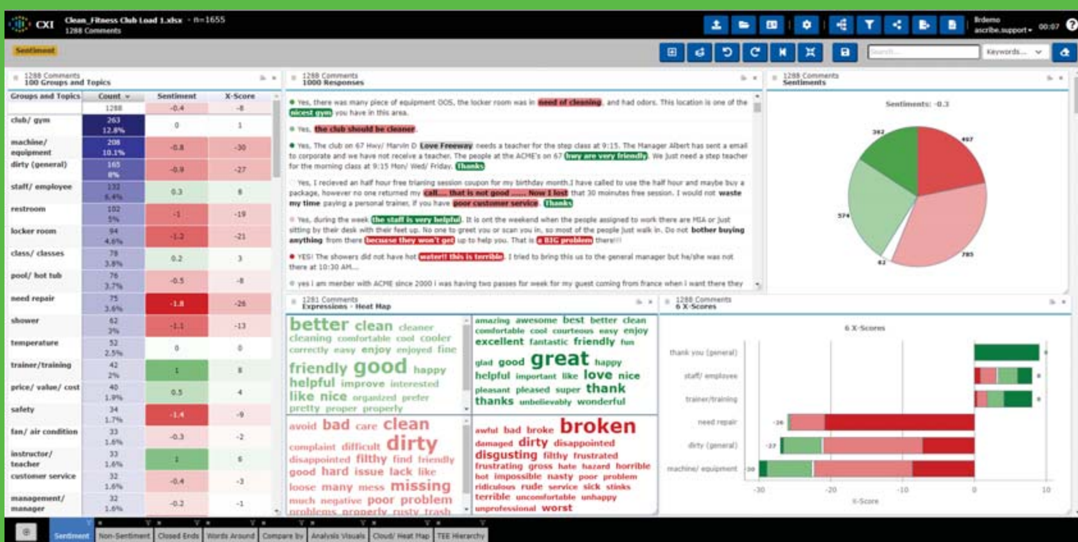

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By Joseph Rydholm, Quirk's Editor

Henderson was a teacher at heart

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Joe Rydholm can be reached at joe@quirks.com

As I have said in this space many times before, two of my favorite things about the marketing research industry are its collegiality – the sense that we're all in this together and what helps you helps me – and its pursuit of better, more effective ways of gathering insights. We lost a prime exemplar of those traits when Naomi Henderson died from COVID-19 complications in December.

As founder and CEO of RIVA, she was a true industry giant and pioneer, helping train legions of moderators and doing so much to establish qualitative research in general and moderating in specific as disciplines that required craft and rigor rather than being something that just anyone can do.

Reading the various online posts following her death, it was clear she touched the lives of so many people in profound ways and my experience was no different. She was one of the first authors to regularly submit high-quality articles to Quirk's after I started here in 1988 and she seemed to inherently grasp founder Tom Quirk's vision for the magazine as a vehicle for education and knowledge exchange.

Even though I was a 20-something kid who was just getting started learning about the industry she was wonderfully patient and kind when I would call her with questions about her manuscripts. (I hope she wasn't forced into practicing unconditional positive regard with me!) Her upbeat manner was so infectious and I always left our conversations feeling empowered and enlightened.

Substantive, insightful articles

Our December issue has historically had an editorial focus on qualitative research as that edition also contained our annual directory of focus group facilities and Henderson was for years a dependable contributor of substantive, insightful articles to it. A look at the titles and subjects of those early Quirk's articles tells you all you need to know about what her goals were in elevating and teaching about qualitative.

"Qualities of a Master Moderator" from December 1989 laid out 25 distinct skills that she had identified as making a Master Moderator, from being comfortable with uncertainty to managing all aspects of a project. *"Continual self-examination, personal stretching of skills and abilities and a questing nature for better ways to handle individuals in the group setting are some of the steps to becoming a Master Moderator. How close are you?"*

"Client ground rules for observing focus groups" from December 1990 was a thorough primer that forcefully but respectfully made the case that the moderator's job is not an easy one and that backroom observers play a major role in having the focus group process go smoothly – in addition to having a duty to do more than eat fistfuls of M&Ms and berate respondents for their appearance or seemingly stupid comments. *"How would you sound in a group discussion about a brand-new idea or product that had just been presented to you five minutes earlier?"*

"Qualitative report-writing – Is faster better?" from December 1992 dove into great detail on the tug of war between client demands for instant insights and the moderator's job of digesting, analyzing and communicating what they've seen and heard in the focus groups. *"If a report has the power to support decision makers, should it be written mostly from memory by someone with little sleep and limited review opportunities?"*

"Asking effective focus group questions" from December 1994 used in-depth examples to stress the importance of effective questioning, not only for the project at hand but for leaving respondents and future clients with a positive impression of the research process. *"The devastating impact of the wrong questions is one of the things that makes focus group research difficult to sell to savvy clients. If they have been burned by moderators who ask two hours' worth of poor questions, it is no surprise they don't want to conduct qualitative research or trust the information they receive from it."*

Felt and echoed

If you didn't have the pleasure of meeting Naomi Henderson, I urge you to go online and read some of the remembrances of her. While we all mourn her passing, it's comforting to know that the impacts of her teaching – her life's work – are felt and echoed across our industry every single day.

INNOVATIVE PRODUCTS & SERVICES

Methodologies, techniques and technology are rapidly changing in the marketing research and insights industry. New products and services are being released at an ever-faster pace. How can you keep up on what is new? Quirk's has you covered. In this section, you will find some of the newest and most innovative tools and services to keep your research up to speed. From the latest in software, technology, methodologies and services, these are the products and service you will want to know about.

Validate your vision with InnovateMR's award-winning Vision Suite™

There is a foundational shift occurring in the world of insights today. Researchers are seeing a growing need for better insights, compelling storytelling and trustworthy results quickly and at scale. Businesses of all sizes are facing enormous pressure to make better data-driven decisions in a volatile, hypercompetitive market. To meet this demand, InnovateMR has developed a technology suite that combines the very best of our trailblazing ingenuity.

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- Reporting analytics and global filtering functionality.
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Tell us about your latest research challenges and let us know how we can support you in your research goals. Ready to team up? Let's Do-It-Together. Learn more or contact us at www.innovatemr.com.

Easily analyze, visualize and share insights

Do you have survey datasets with open-ended responses you wish you could analyze in minutes instead of hours or days? Most researchers do, whether from NPS, customer or employee satisfaction, customer experience/VoC studies or myriad other sources. While valuable information comes from analysis of structured, closed-ended data, analyzing the unstructured open-ended data is often where the most powerful insights are found. However, researchers frequently don't have the time, money or right solution to analyze the open-ended responses at all, losing the opportunity to uncover valuable insights to improve business results.

Reveal insights from surveys in minutes, not hours, to inform business decisions

Ascribe has introduced the fifth version of its text analytics software, CX Inspector, which quickly analyzes open-ended responses, creates customizable dashboards and easily exports results. Using topic analysis and sentiment analysis, powered by the most advanced natural language processing and AI, CX Inspector helps uncover key topics, sentiment and insights, helping business leaders make informed decisions.

Large datasets? No problem

Coding large datasets manually or even with a coding software program can be prohibitively expensive and time-consuming. CX Inspector has the ability to process thousands – even hundreds of thousands – of open-ended responses quickly.

Customizable dashboards

CX Inspector's interactive and customizable dashboards help explore the data and visualize the results. Create a dashboard with preferred visuals, then fully explore the data by clicking to filter by a variable, such as a region, NPS score or by sentiment. Create crosstabs or click to find the responses on a given topic. Easily change visuals and even save dashboards for future use.

Import and export results easily

Easily import data, with the option to automate the data in-flow for recurring studies. Export the results and dashboards to the platforms of your choice quickly to share with other key stakeholders.

Outstanding training and support

Ascribe's experienced training and support teams help new users get up to speed on the software and ensure the results meet business needs.

Ascribe has helped researchers around the globe process open-ended comments for over 20 years. Come explore the new CX Inspector (bit.ly/3qG8bFm) and request a free demo using your own data.

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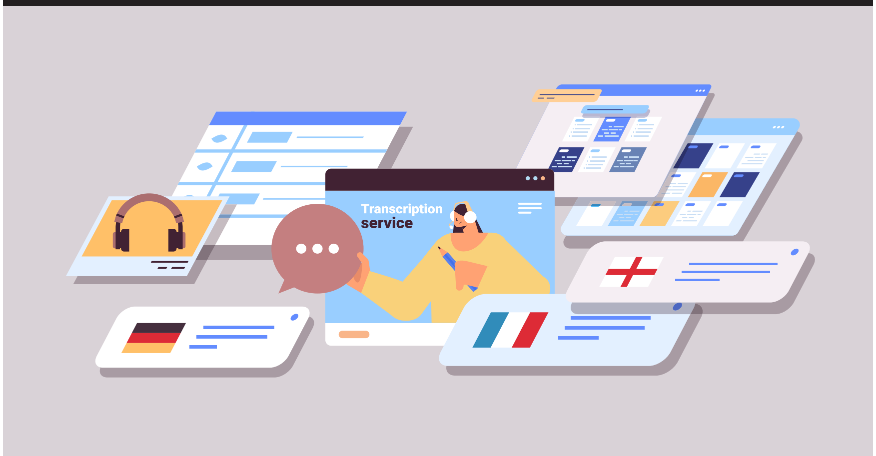

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Phone2Web via Screen Access: The future of high-quality data collection

Traditional research survey methods need a successor. It's time to engage respondents in a way that brings a hassle-free survey experience.

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How it works

This method lets us give respondents access to the interviewer's screen so they can respond to the survey questions directly on the link like they do online. But like CATI, the interviewer is available to assist if needed.

This innovative method allows us to connect with the respondent through sight and sound while conducting the interview, significantly increasing respondent engagement. ActionEdge's Phone2Web via Screen Access method is a smart way to use technology and get accurate responses faster.

Utilize ActionEdge's P2W via Screen Access

- Tap hard-to-find audiences.
- Conduct cost-effective surveys.
- Improve incidence ratio.
- Gain high-quality data.
- Enhance the user experience.
- Get rid of fake and bot-filled responses.

Phone2Web via Screen Access

Instantaneous screen-sharing with respondents is not only advantageous but also requisite for respondent engagement, irrespective of the location. If your business hasn't implemented the use of screen-sharing services yet, now is the time you should.

Learn more about Phone2Web via Screen Access and other core services including CATI, CAWI, IDI and appointment-setting at www.action-edge.com or contact us at sales@action-edge.com.

Putting research in context: Social media content testing

The key to 40% more predictive consumer insights? Testing the impact of social media content in the right (and natural) context! EyeSee developed simulated social media feeds for a completely dynamic and experimental approach to research – meaning that every element of the timeline is fully customizable for all testing needs. The remote behavioral approach taps into how a large study sample interacts with any format of social media content – across all major social media platforms (TikTok, Instagram, Snapchat, Facebook, YouTube and Twitter).

So, how does it work?

The content is inserted into a replicated feed shown on respondents' own devices – mobile or desktop – that allows natural interaction, scrolling and typical user behavior. Because the researcher has complete control of the testing environment in which the content will be shown, it is possible to place the tested ad on any spot in the feed – and customize the content surrounding it.

Why is this important?

The truth is that users spend only about one to three seconds per social media post, so the window of opportunity to catch that sacred consumer attention is narrow. By measuring the advertisement's actual visibility, engagement, video retention and emotional impact in its natural environment, brands can unlock new areas of opportunities and ensure that social media content is perfectly tailored to their target audience. In-context behavioral testing can make all the difference between accurate data and a missed opportunity – and ads tested in the most natural, dynamic and competitive scrollable setting will ensure the most valuable and actionable consumer insights.

Are you interested in social media testing? Reach out to us at info@eyesee-research.com!

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Trust the customer's voice, not your gut

Vennli, a market research firm driven by primary quantitative and qualitative data, delivers quick, custom research and compelling market insights that help brands differentiate from competitors and win customer choice.

Recognized by *MarTech Outlook* as a Top 100 Startup in 2021, Vennli is the brainchild of co-founders Dr. Joe Urbany, a marketing professor at the University of Notre Dame with a proven strategy model, and Gary Gigot, a software executive with a background in technology marketing and venture capital.

Vennli has built its philosophy around Dr. Urbany's three-circle model. Featured in the *Harvard Business Review* and explained in detail in his book, "Grow by Focusing on What Matters," this system enables Vennli clients to understand what customers want, who is delivering in the market, and where customer needs are not met.

With a unique blend of expertise and tech, Vennli has streamlined the market research process, saving their clients time and money and delivering insights so

brands can confidently make decisions. By analyzing how customers make choices and what motivates employees, brands can reduce risk and accelerate growth.

Vennli believes that the best strategies aren't top-down, they're outside-in – starting with the customers' needs and wants. Continuous growth results when the customer's voice drives decision-making and employees are committed to the brand.

www.vennli.com

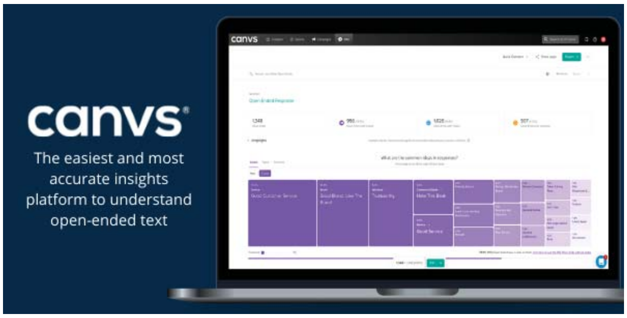
canvs®

It's time to fall in love with open-ends again

Insights professionals often have a love-hate relationship with open-ends. All that nice, quantitative data ruined by slang, emojis and misspellings – that wealth of information and depth and nuance of emotion locked behind the tedious, time-consuming task of coding. As a result, many organizations don't fully utilize the responses from their open-ended questions. Perhaps they code just a sample, use them only for survey quality control or cherry-pick quotes for their reports.

The biggest risk of this approach is missing critical insights that may be hidden in the unstructured text data of open-ends. After all, open-ended questions are one of the most effective ways of generating unfiltered, unbiased consumer feedback. Canvs AI gives insights professionals the power to automate the coding and emotion analysis of open-ended responses, bringing quantitative scale and statistical significance to this form of qualitative feedback. This has the potential not only to accelerate discovery and enhance analytical confidence but also to expand the potential for open-ended questions in research.

Key capabilities of the Canvs Platform include:



Auto-code open-ends

Dramatically accelerates the time required to code responses to open-ended survey questions.

Rich emotional insights

Canvs' patented model of 42 emotions goes beyond basic sentiment to unlock a more nuanced understanding of consumer feedback.

Intuitive, easy-to-use dashboard

Along with striking visuals, Canvs has a powerful drill-down architecture allowing you to quickly and easily dig into the data in open-ended text.

Insights in control

Ability to tune rules and apply customized code frames that learns how you like information organized.

canvs.ai

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For candidates

Outgrown your role or just ready to try something new? Quirk's Talent can help you find your next position in the marketing research and insights industry. You can rely on us to find you the perfect job. There's no cost to you – it's like having a personal talent manager in your corner! And with a job market this hot, you're sure to find your ideal workplace.

Quirk's Talent now places contractors, freelancers, employees and remote workers!

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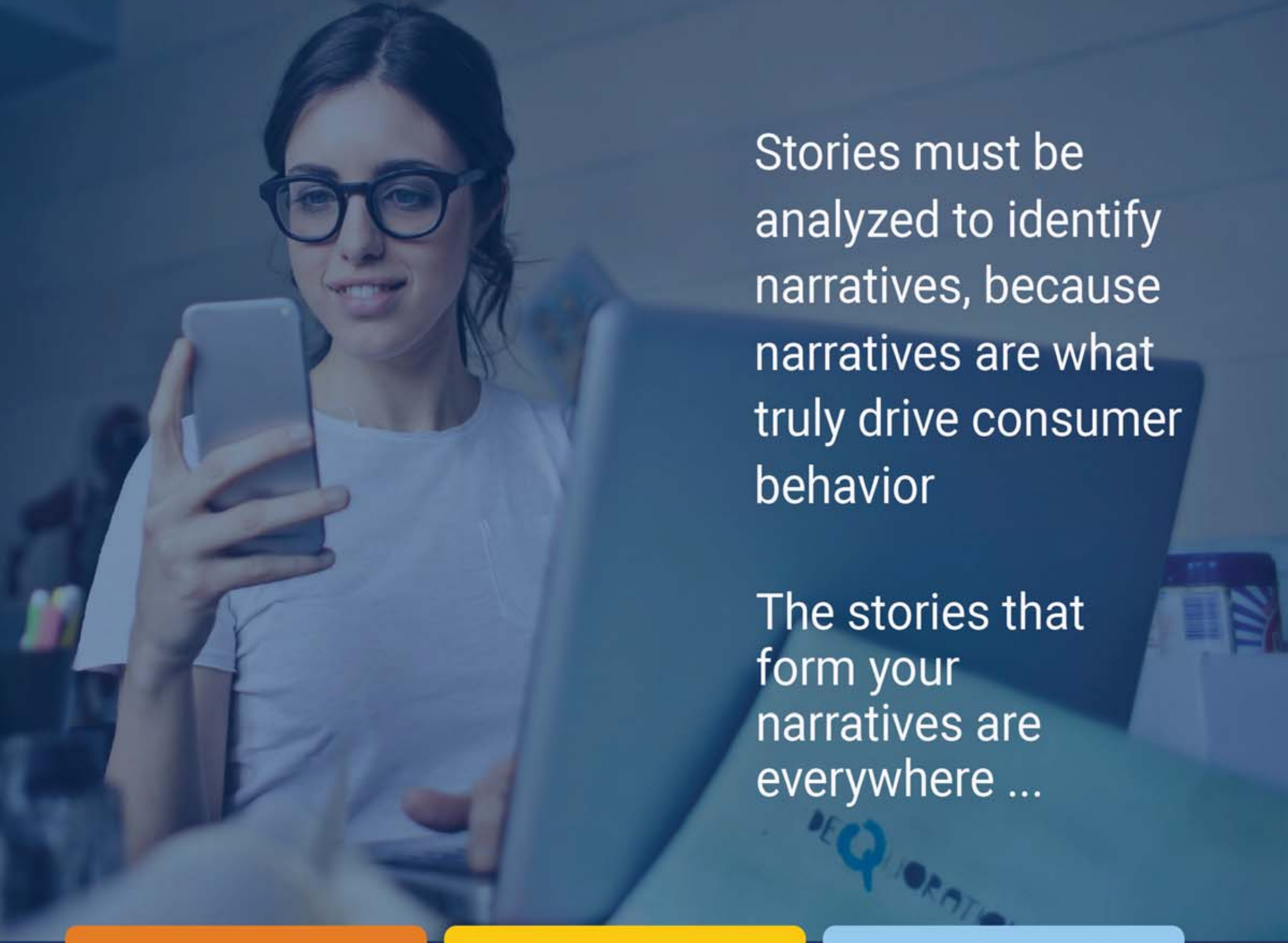
Stories must be analyzed to identify narratives, because narratives are what truly drive consumer behavior
The stories that form your narratives are everywhere ...

IN FOCUS

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

Q // Survey Monitor

••• shopper insights

Convenience is key

Consumers expect advances in contactless shopping

Consumers' payment options were expanding before the pandemic but COVID-19 accelerated interest in convenient and contactless shopping – and consumers continue to have high hopes for future options.

In fact, a study of 1,500 U.S. shoppers by Anyline found that, when asked what they prioritize when shopping in-store, 32% of respondents said that speed of shopping trip was their first priority. An independent and autonomous shopping experience was ranked second (27%) while only 16% of shoppers prioritize interacting with retail workers when going into a brick-and-mortar store.

With the introduction of social distancing and the need to limit physical contact between people, 76% of scan-and-go users started utilizing the offering because of the pandemic. For many, this shift will be permanent, with 79% of respondents saying that they plan to continue using scan-and-go once the pandemic ends.

The vast majority of shoppers have a mobile device that is equipped with a digital camera, ready and available as they walk through the aisles. In fact, 79% of respondents shop with their phone in hand, within reach or easily accessible. When asked how they use apps while in the store, shoppers' three most selected choices were to compare prices (40%), compare brands (25%) and build or update a shopping list (22%).

As for shoppers who are wary of using scan-and-go technology, the top reasons behind their hesitancy include privacy and security concerns. The survey revealed that 35% of smartphone users avoid scan-and-go due to privacy concerns in general. As well, 32% don't want to go through the initial process of downloading an app to use the technology. Thirty-one percent say they don't use scan-and-go because they can't buy certain products with it, such as produce and alcohol.

The study was conducted by Researchscape on behalf of Anyline and polled 1,502 U.S. consumers from December 3-6, 2021.

••• financial research

Shifting priorities

Americans increasingly valuing work-life balance over salary

The past two years have led us to collectively reevaluate our lives, and for 62% of Americans, this means prioritizing work-life balance over a high-paying salary (22%).

KeyBank explored this trend as well as implications for financial mobility in the KeyBank 2022 Financial Mobility Survey, which found that, while the desire for greater work-life balance exists, only a quarter (25%) of Americans say they have experienced an improvement in their standard of living compared to 2020. These findings highlight a shift in mentality as Americans take steps to overcome obstacles and realign priorities for financial mobility.

The survey polled more than 1,000 Americans on their financial and work-related priorities after nearly a year of living through a pandemic, revealing the steps they have taken to become


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more financially mobile. Two in 10 Americans (22%) have made a career shift since the pandemic began, aligning with "The Great Resignation" that defined 2021. Most commonly, Americans chose to retire (22%) or leave for a different role (21%). Those who shifted roles were predominantly younger, with an average age of 37.

Nearly half (46%) of respondents say the pandemic has altered their financial priorities and 49% say it has led them to think more about how to grow their finances – especially those who self-identify as "financial experts" (80%).

Among those who faced notable challenges this year (37%), three-quarters are confident in their ability to grow their finances. This represents a higher percentage than those who did not face notable challenges.

After confronting the hardships brought on by the pandemic, many Americans shifted their priorities to allow more time for themselves and their loved ones, while still focusing on financial health and building financial resilience. While nearly half of Americans say financial information (48%) and digital banking (39%) are top areas that make them feel more financially resilient, respondents are placing greater emphasis on activities that support mental health in 2021 compared to 2020. This includes getting a good night's sleep (43%), the second-highest factor impacting financial resilience, up 5% since 2020.

Additionally, respondents say open communication with their partner or significant other (35%), proper diet and exercise (30%), personal connections (24%) and daily mindfulness exercises (24%) are all factors that lead to feeling financially resilient. In fact, the survey revealed increases in the number of Americans citing these factors as critical to their financial well-being, with an average increase of 7.2% across these board, compared to 2020.

Survey respondents who self-report their financial savviness as expert-level are also more likely to say they have made a "financial faux pas," a financial misstep – highlighting a connection between financial experience and confidence. Despite these missteps, taking risks may translate into confidence, as individuals are able to learn and grow their financial skills and know-how for the future.

Notably, eight in 10 (79%) financial experts say they have made a financial faux pas – more than any other group. This group is also more likely to identify with a "you only live once" financial attitude (34%), than "cautiously optimistic" (32%) and "playing it safe" (31%).

Financial experts' top three financial faux pas include spending their tax return instead of saving it, reacting to market volatility and relying on non-experts to make decisions. Seven in 10 (71%) financial experts are very confident in growing their finances compared to only 6% who say they are not confident.

In a year marked by a shift toward social justice and equity, it's notable that Americans with lower incomes are still reporting less financial savviness and confidence across the board, compared to those with higher incomes – likely due to social determinants of financial mobility.

Nearly four in 10 (38%) Americans who make less than $25,000 per year report being "not financially savvy," compared to the 15% of Americans making between $50,000-$99,000 in annual salary who report the same, indicating a direct correlation between income and perceived savviness.

And yet, it's Americans who are making less than $25,000 annually who report spending more and saving less in the past year (18%). This makes sense, as Americans with greater incomes may have had the luxury of pulling back on discretionary expenses, while those with lower incomes may have needed to continue spending the same portion of their earnings on essentials.

Despite the disparities in perceived financial savviness and financial confidence, Americans across the board report that the No. 1 thing that made them feel financially resilient during the pandemic was financial information (48%). This access to financial information has empowered Americans over the past year, with about half reporting that they have become more financially aware due to challenges faced in 2021.

To protect from financial faux pas, most Americans report that they identify and prioritize needs vs. wants (29%) and determine a monthly budget to revisit on a weekly basis (24%). Access to financial information is crucial to making these spending/budgeting determinations.

The survey was conducted online by Schmidt Market Research and polled 1,081 Americans ages 18-70 with sole or shared responsibility for household financial decisions and that own a checking or savings account. Responses were collected between September 30-October 2, 2021.

••• travel research

Fun for the whole family

Study explores shifts in vacation planning

Are you in need of a vacation? According to research from Vrbo, U.S. families are looking forward to vacationing in 2022 and will book early, stay longer and let kids call the shots.

Vrbo's report found that families are shifting their attention to new destinations, with rental demand more than doubling in Cincinnati; Yorktown, Va.; Niagara Falls, N.Y.; Harrisburg, Pa.; and Matanuska-Susitna, Alaska.

After an irregular 18 months leading to when the survey was conducted in September 2021, parents reported being more likely to reward their kids with extra-special vacations and give them

a bigger say in vacation planning. Half of the families said they're more likely to let their kids decide where they vacation, compared to pre-pandemic times, and one in three are more likely to let their kids invite a friend. Additionally, 43% of parents are more likely to let their kids skip school for vacation. One place where parents still rule: 61% of those surveyed said they are more likely to require their children to disconnect from their devices on vacation.

With the huge uptick in pet ownership over the course of the pandemic, more families are opting to bring their furred companions along on vacation. Vrbo experienced a 40% increase in year-over-year demand for pet-friendly vacation homes. More than 70% of this year's survey respondents were pet owners, 68% of whom have traveled, plan to travel or would like to travel with their pets. The top reason for traveling with pets is because families don't like leaving them, followed by wanting the whole family to be together.

In 2021, booking activity on Vrbo occurred on average two to three months earlier than usual for several major travel seasons, like summer and the holidays. Sixty percent of respondents said they plan to book future vacations earlier than they did in pre-pandemic times.

As people started returning to the office and employers introduced partial or even permanent work-from-home policies, families changed their outlook on vacation time, flexibility and work-life balance. Seventy-seven percent of families agreed that they have a greater appreciation for separating their professional and personal lives, compared to pre-pandemic times. Further, 59% of respondents said they are more likely to take a two-week vacation and 30% were more likely to take a sabbatical, while 42% were less likely to check work e-mail on vacation.

The study used Vrbo travel demand data in the U.S. for the 12-month period ending August 31, 2021. Vrbo conducted a survey of 1,000 U.S. families during September 2021.

••• small business research

Making it work

Black-owned businesses find growth despite pandemic

From February 2020 through August 2021, Black-owned businesses increased by almost 40% despite the slight drop in white- and Asian-owned businesses – but according to a MerchantMaverick report, some states are fostering more Black entrepreneurship than others.

While on the rise, Black-owned businesses still face hurdles to grow representatively; only 2.3% of the employer businesses in the U.S. are Black-owned despite African Americans making up over 14% of the population.

The mid-Atlantic pocket of Virginia, Maryland and Delaware is particularly fruitful for Black entrepreneurs, as the trio ranked first, second and fifth, respectively, in MerchantMaverick's list of the top 10 states for Black entrepreneurs in 2022. The region's success can be attributed to its sizable Black population, as well as local government and private initiatives built to foster Black-owned businesses.

Southern states generally dominate the ranking. In fact, just one top 10 state (Ohio) is firmly located in the northern half of the contiguous 48 states. The southern dominance extends past the pinnacle as the three highest-ranked states outside the top 10 (Mississippi, Tennessee and Arkansas) are all located soundly in the South. In order, the top 10 states for Black entrepreneurs in 2022 are: Virginia, Maryland, Texas, Nevada, Delaware, North Carolina, Ohio, New Mexico, Georgia and Alabama

Black-owned businesses face major inequities when it comes to payroll. The national average annual payroll for employer businesses is $1.25 million – over four times the $301,000 in payroll Black-run employer businesses average per year. A funding gap almost certainly plays a role here. Earlier research by the Stanford Institute shows that White-owned businesses receive an average of $18,500 in outside equity at founding, compared to just $500 for Black-owned businesses. Already starting at a disadvantage, Black businesses face hurdles while attempting to catch up down the road.

MerchantMaverick developed its "Top States for Black-Owned Businesses in 2022" report by analyzing data from sources including the U.S. Census Bureau's 2020 Annual Business Survey, the U.S. Bureau of Economic Analysis and TaxRates.org.

••• health care research

Inequities old and new

Consumers face challenges when accessing health services

While the pandemic caused a variety of new problems for the health care industry, for many Americans it also exacerbated disparities in health care access that already existed before 2020.

While 70% of health care consumers see a doctor or access health services regularly, 25% of all health care consumers in the U.S. say it is difficult for them to access health care from high-quality doctors or hospitals. These findings come from the "State of Access to Healthcare in America" report released by Teva Pharmaceuticals in collaboration with the Morehouse School of Medicine. The survey uncovered that access barriers due to the pandemic impacted groups that are already likely to be more vulnerable, with caregivers (58%), women (53%), patients (74%), BIPOC (45%) and those with anxiety (29%) and depression (25%) reporting greater difficulty with health care access.

For the report, the Harris Poll surveyed 4,188 U.S. consumers and more than 600 health care providers (HCPs) including physicians, pharmacists and nurses, about their experiences accessing and providing health care during the pandemic. The survey found that approximately 40% of HCPs report that the overall health of the patients they see has worsened since before the pandemic, while at the same time consumers are uncomfortable or limited in reaching the nearest hospital emergency room or urgent care facility, both due to the pandemic but also due to persistent barriers to accessing health care services.

Among health care consumers, 50% say they postponed or canceled health care services since the pandemic began. Routine exams, annual health checks and dental care are most often avoided. Some 64% of health care providers also report that patients postponed or had to delay seeking health care due to the pandemic. Those facing access issues are far more likely to delay or cancel a health care consultation for an adult or child in the household (cancel or delay an adult visit 70%/77%; child visit 72%/77%) compared to those who do not (cancel or delay an adult visit 36%/49%; child visit 47%/53%).

Consumers who delayed care cited exposure to COVID-19 as the primary reason but other reasons include inability to take time off, lack of childcare or lack of transportation, especially for younger, Hispanic and lower-income households. Economic barriers were also a factor for BIPOC consumers with 25% receiving unemployment benefits during the pandemic. Notably, one in 10 consumers also report challenges with prescription access or medication shortages and this is a greater problem among younger health care consumers, urbanites, parents and BIPOC consumers.

While 47% of physicians say their practice experienced a decrease in routine visits, 59% report increases in mental health consultations. A vast majority of physicians (84%) report an increase in new diagnoses of mental health conditions since the pandemic began, with nearly two-in-three (65%) also mentioning worsening conditions among pre-diagnosed patients. Mental health conditions (anxiety and depression) are reported more among Hispanic adults, women, younger adults, adults residing in lower-income households or those with lower education.

Looking ahead, telehealth is expected to be a prominent approach for addressing health care needs and inequities in access, with 58% of consumers saying they are likely to use telehealth to see/visit their doctor or health care provider after the pandemic. Like health care consumers, three-fourths of physicians and over half of pharmacists say they are likely to continue offering telehealth consultations even after the pandemic. However, telehealth is still not accessible to everyone, with more than one in three physicians and about half of pharmacists noting that most of the patients they serve are from low-income households and do not have the means to easily access telehealth. Three-fourths of physicians and 50% of pharmacists intend to provide virtual consultations even after the pandemic ends but one-third of health care providers report that access to telehealth is still limited for patients with low incomes.

Although a majority of health care consumers (61%) note they rely on physicians for information, during COVID-19, more than two in five (44%) increasingly turned to other sources of information (e.g., internet searches, patient support groups and social media) to help them and their family access the resources they need. Nearly 40% also indicated relying more on other types of health care professionals besides doctors (e.g., nurses and pharmacists) for their health care needs. Most health care consumers (65%) also shared that they intended to pursue lower-cost care options like using over-the-counter/generics over branded medicine, as well as look for smaller or low-cost clinics, among other solutions.

The survey was conducted online by The Harris Poll on behalf of Teva and polled 4,188 U.S. adult health care consumers and 602 health care providers (201 PCPs, 201 NPs/PAs and 200 pharmacists) from September 30-October 20, 2021.

••• special advertising section

10 TOP ADVERTISING RESEARCH COMPANIES

Advertising is an excellent way to reach a large group of consumers with a targeted message – but these efforts are wasted if a campaign isn't effective. Companies specializing in advertising research can ensure the success of an ad campaign through specialized tools and methodologies that give brands insight into the consumers they're trying to reach.

The following companies are here to help boost advertising effectiveness – through choosing the right medium, targeting the correct consumers and understanding the competition to ensure a successful campaign. These companies have the tools and experience to take your advertising to the next level.

Decision Analyst

Decision Analyst

Founded 1978 | 150 employees
Jerry Thomas, President and CEO
Bonnie Janzen, EVP

Decision Analyst is a leader in advertising research and communications testing. Its research professionals have evaluated thousands of ads and commercials for consumer packaged goods, food service, retail, hospitality, automotive, financial, health care and technology brands. Decision Analyst continues to evolve its analytical techniques and mathematical models to enhance the learning from advertising research. Decision Analyst offers an array of advertising testing services. CopyScreen® is an advertising research system to screen early-stage advertising

ideas and concepts in print-ad format. CopyCheck® is an online advertising research system to help evaluate advertising concepts, early-stage print ads, TV animatics and radio scripts. CopyTest® is a comprehensive, online advertising pretesting system to predict the effectiveness of semifinished to finished commercials and advertisements for TV, online, print and radio. CopyTrack™ is an industry-leading system to track advertising campaigns over time to monitor awareness and effectiveness.

Phone 1-817-640-6166
www.decisionanalyst.com/services/brandconsulting

ENGINE Insights

Founded 1938 2018 | 1,200 employees
Don Simons, CEO

ENGINE's Audience Intelligence brings the audience you need to reach right to your fingertips enabling seamless, instant access to fresh data, when you need it. Profiling your audience to activate has never been easier. ENGINE's Audience Intelligence enables agencies and brands to understand customers and prospects, define their needs and determine how to best reach them. Our interactive platform provides comprehensive insight into the demographic makeup of your customers and prospects, what they are watching, reading, listening to and what they value and find interest in. Brands and agencies can quickly and easily build rich audience profiles leveraging consumer media behaviors across print, linear, CTV (connected TV), radio, digital, social and podcasts, including content preferences, day parts, digital habits, demographics and psychographics.

Phone 1-212-633-4567
engine-insights.com/product/audience-intelligence

Fieldwork

Founded 1980 | 250+ employees
Steve Raebel, President

Our specialties include B2B, consumer and global research. For over 40 years Fieldwork has recruited the highest quality business, medical and consumer respondents both through and far beyond databases, using proven methods to reach your audience. We believe in a customized approach to recruitment. Fieldwork provides unsurpassed project management, hosting and complete guidance through in-person, remote/online and hybrid research sessions. Our technically versed support staff will confidently guide you through the logistics from large online to multi-country project execution. Fieldwork is your qualitative research partner. Focus on the research. We'll do the rest.

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www.fieldwork.com/market-research-services

Fuel Cycle

Founded 2009 | 120+ employees
Eran Gilad, CEO

Fuel Cycle's award-winning Market Research Cloud is the most comprehensive intelligence-gathering ecosystem that exists today. Our platform enables decision makers to maintain constant connections with their customers, prospects and users to uncover real-world actionable intelligence. By integrating human insight with critical business data and through automated quantitative and qualitative research solutions, Fuel Cycle's Market Research Cloud powers product innovation, brand intelligence and enhanced user experience. Breakthroughs require action. We built Fuel Cycle to ignite it.

Phone 1-323-556-5400
www.fuelcycle.com

GWI

Founded 2009 | 375 employees
Tom Smith, CEO
Jason Mander, Chief Research Officer

GWI is the leading audience insights company. The company's flagship survey represents 2.7 billion people globally, by continually collecting data across 48 countries. It provides global data at an unrivaled scale to help businesses gain a deep understanding of their audiences at speed. Its SaaS platform and custom data products are trusted by the world's biggest brands, media organizations and agencies. Customers include Google, Spotify, Twitter, EA, Red Bull, WPP and Omnicom.

www.gwi.com

Ironwood Insights Group LLC

Founded 2017 | 300 employees
Brian Cash, VP Research Services

Ironwood Insights offers expert-level consultation and execution across a full spectrum of insights services: forward-thinking methodologies and design, industry-leading data collection quality and leading-edge analytical frameworks. Ironwood helps clients develop, optimize and measure the effectiveness of their communications to ensure they are sharp, relevant, compelling and on-brand. We bring unique solutions and a pragmatic, clear-eyed view of the advertising process: development (early-stage evaluation to ensure clarity, believability, distinctiveness, brand alignment), evaluation and optimization (message recall/takeaways, optimization of key advertising components, such as positioning, tone, imagery, etc.), effectiveness measurement (assess the hierarchy of effects – from awareness to consideration to action – brand lift, etc.), external synthesis (integrate external metrics, such as social media reach/sentiment, traditional media impressions/spend, sales performance). Contact us to learn more about how Ironwood provides clients with actionable, durable business outcomes that create a lasting competitive advantage.

E-mail info@ironwoodinsights.com
Phone 1-602-661-0807 ext. 2105
www.ironwoodinsights.com

Mindspot Research

Founded 2006 | 8 employees
Lynnette Leathers, CEO and Lead Moderator

Mindspot is a full-service custom online research consultancy. Online surveys are a core competency and the team at Mindspot Research design them every day on their proprietary survey platform. Their advertising testing evaluates each campaign spot, commercial, print or digital asset and the message being communicated. With two decades of experience, they can help qualitatively gain feedback to design and refine campaigns. Their research technologies have advanced security features including digital watermarking and no right-click downloads. Their services and seamless process offers pretesting ad concepts among members of your target market, reducing risk, increasing in-market success for campaigns and providing the greatest return on your marketing investment.

Phone 1-407-730-4603
www.mindspotresearch.com

Provoke Insights

Founded 2014 | 8 employees
Carly Fink, President

Provoke Insights is a full-service market research firm that specializes in branding, advertising and content marketing research initiatives. We do not conduct research that sits idle on a shelf; we create strategic plans tailored to your objectives and needs. As a team of market research experts and brand strategists, we'll ensure that questions are deeply explored and actionable insights are delivered – insights that your brand can capitalize on. Our agency works with a diverse range of clients, from start-ups to Fortune 500 companies, and has Madison Avenue experience. Current, creative and agile – we enjoy creating impactful solutions that deliver value for today and the future.

Phone 1-212-653-8819
www.provokeinsights.com

Savanta

Founded 2019 | 450+ employees
Kyle Gollins, SVP, Head of Commercial Americas
Marni Hirschorn, SVP, Account Management


Savanta is an innovative research and advisory firm. We inform and inspire our clients through powerful data, empowering technology and high-impact consulting. All designed to help our clients make better decisions. Savanta offers a suite of digital ad performance solutions using a non-cookie-based solution to evaluate in both a pre- or live-campaign environment across any digital or social media environment. Campaign tests run on your schedule, based on your target audience for consumer- or B2B-focused brands. By using both behavioral social engagement data and brand lift KPIs, Savanta provides a complete performance evaluation. Learn more: savanta.com/digitalad

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Founded 1966 | 1,200 employees
Rob Berger, EVP – Global Quantitative

Schlesinger Group is the world's most comprehensive data collection and market research services provider, delivering a broad range of quantitative and qualitative solutions to help you better understand your audience and what motivates them. We own and operate consumer, business-to-business, health care and patient panels comprising millions of stringently vetted and deeply profiled participants globally. Using our vast panels, experienced teams and technology-driven online, mobile and in-person solutions, you gain high-quality insights from nationwide or hard-to-reach audiences, fast. Working in partnership with you, our experts take a consultative approach to helping you meet your research objectives, timeline and budget. Contact quant@schlesingergroup.com.

Phone 1-732-906-1122
SchlesingerGroup.com

The 15 hidden metrics of customer centricity

| By Steve Crewdson and Grace Schafer

snapshot

The authors report on their work to show a link between 15 customer performance indicators and future customer value.

It's been said many times before: The customer is king. A satisfied customer is the best business strategy of all. A customer's perception is your reality.

While wonderful in sentiment, these platitudes are far from reality when it comes to business growth strategies. Practically speaking, organizations today largely set business goals – or KPIs – around profit, growth and operational efficiencies.

One can say that businesses that solely rely on customer satisfaction and Net Promoter Scores (NPS) as a proxy to gauge customer sentiment generally operate under the illusion that "active and satisfied customers' needs are being met over the long-term."

What these customer KPIs illustrate is the likelihood customers will purchase again down the road; in other words, the value customers are creating for the business. But where they fall short is providing an understanding of the value the business is creating for its customers beyond "value for the money." Without digging deeper, brands risk being out of tune with what customers really want and are likely to overlook opportunities for customer-centered innovation and growth.

Another common myth

What can keep businesses from truly operating with the customer at the center of decision-making is yet another common myth: It's not scalable, or even possible, to truly understand and act on customers' individual needs.

This belief makes sense, given the limitless spectrum of potential needs and the fact that human mind-sets seemingly shift with the wind. But what if we were to look instead at what drives customers' motivations and behaviors by evaluating what underlies and shapes those needs? We can refer to these as desired universal outcomes or customer goals but the idea is the same: they represent customers' human hardwiring and they don't change appreciably over time. This is the core concept of the values-based approach to understanding consumer behavior developed by Bain futurist Andy Hines and others: Why try to track thousands of shifting needs in real-time when we can focus on a fixed, stable set of metrics?

New research in this area reveals three universal goal categories, comprising a total of 15 customer performance indicators (CPIs) that help customers to function, thrive and succeed as human beings throughout their lives. And analysis validated the direct relationship between CPIs and customer lifetime value (CLV) with 90+% accuracy. Lastly, and perhaps most importantly, it has shown that as the number of CPIs executed on for a customer increases, so too does growth in CLV accelerate.

Three-phase process

With the aspiration to create an exhaustive and exclusive list of universal human goals, two renowned sources in the customer value space were used as inputs: Bain's Elements of Value (2018) and the (Dr. Andy) Hines Value Model. This desk research was the first of a

VALUE TO THE CUSTOMER (CPI's)

FUNCTIONAL
- Easy access to the information I want/need
- Makes my life simpler
- Saves me time
- Improves my physical wellbeing
- Saves me money
- Gives me options

EMOTIONAL
- Improves my mental wellbeing
- Makes me feel good
- Reduces my anxiety/risk
- Motivates me
- Provides me a sense of accomplishment

SOCIAL
- Provides me with a sense of belonging
- Allows me to connect with others
- Allows me to help others
- Elevates my perceived status

three-phase process where we explored the 23 human need states that reflect the future of human consumerism.

Using these two inputs, we developed a mapping exercise to match Bain's 30 Elements of Value to Hine's 23 human need states, combining those that serve the same need and discarding those that were redundant or non-universal. Rooted in Maslow's hierarchy of needs, Bain's four categories of value were used as a starting point to delineate functional, social and emotional needs. This allowed us to create an exhaustive set of desired consumer outcomes or CPIs.

We found that both of these frameworks encapsulate and organize perceived consumer values, though their elements are not mutually exclusive in the human goals they service. For example, two of Bain's Functional elements of value – "reduces effort" and "avoids hassles" – can both ladder to the greater goal, "makes my life simpler."

The third phase was conducting a quantitative survey across 20 leading, disparate brands to validate the 15 CPIs (Figure 1) to ensure they are both exhaustive and exclusive to one another. By validating the CPIs across disparate brands, we ensured focus on only the CPIs that are universally applicable across industries. Additional customer goals may be relevant when looking at a brand or industry in isolation.

A survey was fielded in August 2020 with 1,000 U.S. consumers who had recently purchased one of 20 leading brands' products: 10 brands traditionally scoring high in the American Customer Satisfaction Index and 10 brands that scored lower on the same metric to ensure sufficient differentiation.

The analysis compared CPI scores to a preliminary calculation of future customer value (FCV) to test which potential CPI showed a relationship with business outcomes. For the purposes of this validation phase, FCV was calculated as a weighted average of three business outcomes:

• likelihood to recommend the brand to others (NPS)*
• likelihood to do business with the brand in the future (brand loyalty)
• current share of wallet held by brand vis-à-vis direct competitors

(*Note, in the syndicated results, NPS was replaced with frequency of spend when calculating FCV.)

Following our analysis, we found a statistically significant relationship between 15 CPIs and FCV – this proved and quantified the fact that CPIs drive financial business outcomes. Furthermore, we found that as performance on a single CPI increased, so too did the FCV, and additionally demonstrated a compounding effect, whereby as the number of positive CPIs increases, the predicted FCV also increases accordingly.

And lastly and of interest, we found that different CPIs had different levels of importance to customers of various brands. And while these patterns may seem logical, it demonstrated that CPI "importance" is unique to each brand, like a brand fingerprint.

Fixed set of goals

Understanding customers doesn't have to be complex, nor ad hoc, when we shift focus away from their changing needs, experiences and expectations and drill into a fixed set of universal goals humans share – emotional, functional and social. CPIs can serve as accretive to KPIs and together become the North Star for both customer-centric mind-sets and business growth because they create an understanding of what businesses provide customers, as opposed to just the value that customers are creating for the business. It's also a path to a better business strategy that realizes potential, finds new opportunities and maximizes returns.

Steve Crewdson is senior research lead at Gongos Inc. Grace Schafer is senior research implementation associate at Gongos Inc.

It's Baaaccccckkkk!!

MR Industry, Get Ready to Race!

MREF's 2nd Annual Race Around the World for Education will take place May 1 – 30, 2022!

Get your colleagues, friends and family together and get ready to walk, bike & run to raise funds to support educating marginalized children around the world. For the entire month of May our industry will come together in support of each other and a great cause.

Last year more than 1,100 participants and 35 sponsors raised $100,000 and logged more than 75,000 miles.

Will you join us in 2022?

Visit MRGivesBack.org to become a sponsor, register a team or individual and learn more about this year's beneficiary, Baal Dan Charities.

Our team loved the event! What a great motivator. Thank you so much for making this happen. Can't wait for the next one!
– Kim Harrison, CEO, Focus Forward & FF Transcription

The MREF Race was a great way to bring our industry and internal teams together to support children's education around the world. FUEL + The Focus Room were honored to participate in this event as a Champion Sponsor. Kudos to #MREF for a successful event – we really enjoyed it and can't wait until next year!
– Tiffany Hays, CEO, FUEL + The Focus Room

OUR MISSION

To unify, inspire and activate the marketing research community to focus its collective resources to educate children and youth worldwide.

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RACE AROUND THE WORLD FOR EDUCATION

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IT'S A
GREAT DAY FOR
DISCOVERING WHY

••• qualitative research

Now and in the future

How the pandemic has changed digital qual

| By Katharina Ladikas and Edward Appleton

snapshot

The authors offer a European perspective on trends in the use of digital qualitative research.

More than 18 months have passed since qualitative researchers in Europe were forced by the first wave of the pandemic to go fully digital, to switch from face-to-face (F2F) to digital in core approaches – focus groups and in-depth interviews.

The responses have been overall very positive – "no way back" is how the editor-in-chief of German marketing research publication Planung & Analyse described it in a recent issue focusing on qualitative research. Digital qual definitely works, delivering extremely well on all sorts of insights briefs, such as getting depth insights digitally, assessing emotions and understanding people's reactions.

In this article, we look forward – and look back. Our assumption: that future forecasting is best done by fully understanding the present and recent past, looking at overall dynamics and early trends.

Following this principle, we start by reviewing the past several months and ask: What's changed since we first talked about digital qual and online empathy in our company's May 2020 webinar? Secondly, we look at emerging trends – aspects of qualitative that are establishing themselves as part of the new best-practice normal. Finally, based on the first two sections we share our vision of how the future qualitative landscape might look and what that might mean for future insight-generation.

Digital qual: new ground rules

The switch in qualitative research accelerated by the pandemic brought many changes, most notably a shift to doing group discussions and in-depth interviews digitally.

As with any change in data collection mode, the transfer of good practice from face-to-face was a hugely valuable baseline but much adapting and adjusting was required, with some reinvention necessary. Digital has its own rules.

In the following we look briefly at the most fundamental areas of

change: length and size of group discussions; different moderation approaches and participant engagement strategies; and the breaking down of geographical barriers, both in-country and internationally.

Shorter and smaller. The most basic change in the switch to screen-to-screen groups was in the length and size of the discussion. While face-to-face groups would often comprise up to eight participants and invariably last for about two hours, digital has forced a rethink to shorter and smaller. After all, online has its own rules in terms of time and space; digital attention spans can be short, distractions abound.

Four to five participants is optimal, six at the most to ensure proper engagement and in-depth responses, a good discussion flow and smooth interaction between participants. In terms of duration, 90 minutes works well. Beyond that, different engagement approaches are needed.

Online co-creation tasks can be effective for up to two-and-a-half hours – the moderator has to shape the session to keep people energized and involved. Breaking it down into smaller sessions – "chunking" – works well, as do breakout sessions with smaller groups. Introducing short breaks and even doing simple invigorating exercises also helps.

Stimulus that really stimulates. That leads to the second important point: the need to involve participants more and differently. Stimulus material in whatever form needs to be more involving – stimulating, as the word suggests.

Digital has shortened our attention spans and ability to concentrate and setting tasks is one way of countering this, keeping people engaged – getting participants doing things, setting homework, punctuating sessions with mini-tasks during sessions with precise instructions.

The moderator's changing role. For moderators, digital empathy requires a different approach, even more attentive and responsive. With F2F, it's easier to create atmosphere, make people smile; digitally that's trickier as people engage differently. Moderators need, for example, to exaggerate – to look skeptical longer or to really adopt a facial expression that is encouraging in a very clear manner, in a way that in real life wouldn't be necessary or would seem odd.

There's also the challenge of managing people who repeatedly want to be the first to answer. With F2F it's easy to use body language and verbal cues to subtly make the point that all views need to be heard. Digitally, it's more challenging; things need to be more direct in the interests of clarity. This can easily – irrespective of cultural preferences – lead to people feeling slightly offended and then going into a hidden sulk, which the moderator then needs to manage.

The more, the merrier? Digital has significantly extended qual's audience reach. All sorts of people are now involved in in-depth insights generation that were previously off the recruitment map.

Geography and distance play much lesser roles. Participants and clients don't have to make time to come to a central location, meaning rural or remote audiences can be involved more easily, allowing for a better geographic dispersion. Time slots are more flexible. Lunch breaks, for example, can now be dedicated to a qual session from one's computer at home or at work. This has opened up whole new B2B audiences.

If a client needs to take regionality into account, it's also possible to involve people from different regions in one country in the same group.

International projects have perhaps changed the most. It's now possible to cover far-flung geographies in different time zones more conveniently – say, groups in Tokyo in the morning, London in the afternoon and Houston in the evening. "No travel required" means savings in time and hotel and airfare costs along with eco-efficiencies and freedom from jet lag.

There are many more changes than we have space to discuss here but in summary, the switch to full digital has been hugely empowering for qualitative research. It has caught up to other sections of the MR industry that went fully digital much earlier. It has become nimbler and more cost-effective with no loss of depth.

Evolving protocols and practices

Next let's look at trends – areas of digital qual where protocols and best practice principles are still emerging.

The shift to fully digital in qual has been less abrupt thanks to experience gained over many years with tools such as online insight communities and digital ethnographies. Most moderators are comfortable with online research tools and techniques but doing things in real time (as opposed to asynchronous tasks set in online communities, for example) has created new learnings and challenges.

Here's a short list of some typical qual tasks and our observations and takeaways from recent project work.

- **Digital brand mapping**. Drag-and-drop functions are so flexible that people can correct and ponder while actually thinking about what they feel, what they want to say. A bit more System 1, faster, more intuitive.
- **Positioning exercises, competitive mapping, brand-stretching tasks**. Digital tasks are super easy, pulling tiles from A to B with the mouse. This makes all sorts of positioning and brand exercises work smoothly, where participants are challenged, for example, to say which brands are the best fit for a number of consumer segments.
- **Picture sorts**. People have great fun uploading, sorting. Asking participants to explore the thinking behind the groupings is really concrete and results in broad, insights-rich feedback. Done digitally, the task becomes close to a co-creation exercise, as people do things at the same time as they're thinking.
- **Integration of quant tasks/quick polls**. Moving between rating or ranking to in-depth exploration has become much easier. Software often helps gamify, offering visuals, fun elements, smilies, etc., plus real-time presentation of results. This allows researchers to take quick temperature checks and react accordingly – an agility which was more challenging with face-to-face.
- **Shopper insights**. Digital shop-alongs hold up well so far in our equivalence assessments against F2F. Participants are tasked to go shopping, we accompany them digitally and participator and moderator actually experience things at the same time. Compared to face-to-face, it's easier and more convenient to execute when done digitally, more flexible to organize and with slightly lower costs.
- **In-home usage tests (IHUTs)**. We have been pleasantly surprised by how feasible IHUTs have proven to be. Product samples are dispatched, opened and tried right in the middle of the online groups – evaluated individually in people's own homes, all at the same time. This digital immediacy allows a broad range of client-side stakeholders to witness the emotions participants undergo in real time and pose specific questions, via the moderator, if needed.

There are many more areas – projective techniques work well digitally, for example, as do ethnographies (we have a great case study on digital ethnographies; if you're interested, please get in touch) – but in the interest of time we will move on.

Frontline observations. When shaping digital qual approaches to address insight needs, we always monitor the changing landscape, both technologically and in participants' behaviors. Both are moving fast – many of us have spent more time than we anticipated online over the past 18 months of on-off lockdown.

Here are some of our observations from the front line of digital qual during that time period.

Digital confidence is increasing across all age groups – unsurprisingly, as the pandemic has forced us to become Zoom power-users. Tasks such as logging in, using key functionalities and un-muting require less and less practice time prior to an online group.

This confidence occasionally results in a different challenge: participants thinking they know Zoom inside and out, not bothering to do the setup test and ending up not being able to participate or connect their headphones, dropping in a little late, etc.

Sometimes respondents are too relaxed. They're more in lean-back rather than lean-forward mode. For the moderator this poses a diplomatic challenge: Asking someone to open their own bedroom window isn't as easy as doing it yourself in a studio context.

We also notice changes in people's habits on their digital background choices. The bonus ethno insights that digital delivered seem to be falling away. About a year ago, researchers often got a free mini-glimpse into people's homes, allowing us to see personal stuff in the background, but now more and more people are choosing a backdrop (a palm tree, a beach, outer space) or blurring their background.

Tech as a facilitator instead of a barrier. While most of the technology used in digital qual likely isn't particularly new to experts in IT, it's key to how digital qual has taken off and gained broader acceptance, penetrating into more and more divisions of research-buying companies. Client participation has become much easier (and cheaper) – they can just log in from their laptops wherever and whenever. Involving key stakeholders outside the insights department is much easier, requiring nothing more than sharing an invite link.

However, the commitment levels of logging into a session are so much lower than, say, booking time to travel to a central location and thus these slots are more in danger of being bumped or de-prioritized – a watch-out for anyone interested in helping extend the reach of consumer closeness across the organization. Nevertheless, we have definitely seen more R&D staff joining at the end of a session digitally over the past 12 months and they seem to love it. For the activation phase of innovation projects this has been extremely valuable.

Once clients are involved and plugged in, there is still a need for them to be reminded of the rules of engagement: how to use the chat function, mute/unmute, "hide" themselves, etc. It certainly helps for smoother sessions if clients don't suddenly pop up unexpectedly in the screen, with their faces and names and even the company name visible. This still happens.

Managing the feedback culture from clients is another evolving task – getting chat notes from individual clients is a challenge. Ideally one client-side person collates all client feedback and then passes it on to the moderator. We see improvements over time but this is still an issue.

New tasks – what value? Switching to the moderator and agency perspective, digital also involves new tasks

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Both sides now

Woodside Homes

Woodside Homes Director of Consumer Insights Jason Jacobson discusses seeing insights and research from both the consulting and insights perspectives and how to bridge the gap between the two sides.

Implementing a CX program: The good, the bad and the ugly

Woodside Homes

On the surface, implementing a CX program should be easy, right? Just figure out your touchpoints, survey questions, secure a vendor and boom, there you go! However, there are a lot of challenges and pitfalls that should be revealed and out in the open. Here is our experience.

Research recruiting: How do you stack up to best practices?

Panelfox

This session is for companies who do research recruitment and manage a panel. Learn about best practices across the industry and see how your process and results stack up with the rest.

Uncorking a Story: Qualitative lessons learned by interviewing A-list authors

Uncorking a Story

At its core, marketing is a field that is built on creativity. What do consumers need? How can we make that? How can we best tell them about it? How do we get it to them? Creativity is fueled by stories. Stories capture our attention and move us to think, feel, and ultimately do. Authors dream up stories for a living and I've been uncorking their stories for the past nine years in qualitative interviews through a podcast. This presentation will illuminate the lessons I've learned from authors and link how they apply to marketing and qualitative market research.

How to integrate UX research into the agile product development lifecycle

Kabbage, American Express

Aligning UX research with product sprint cycles is challenging! In this session, we will cover some scrappy and low-lift ways to conduct research that can complement a spring cycle, and we'll also share a case study from the fintech industry.

Insights roadshow: Take your stakeholders on an immersive trends journey

Tillamook County Creamery Association

Identifying and prioritizing consumer trends is crucial to ensure innovation and business decisions are relevant and successful in a consumer-centric marketplace. But statistics and competitive case studies often cause trends presentations to fall flat. We'll discuss how to make sure your business partners are fully engaged and understand the world in which they are doing business.

Got Spruce? Cold brew coffee finds an extraordinary target during extraordinary times!

Spruce Haven Farm

Spruce Haven Farm has developed a ready-to-drink cold brew coffee product that is a combination of responsibly sourced 100% Arabica coffee from Guatemala and milk produced on their farm, that is high in protein and that provides a boost of immunity. RTD Cold Brew is quickly becoming the beverage-of-choice among the Gen Z and Millennial population. Spruce and its research partner recently completed a project to identify the optimal positioning among this attractive target, during these uncertain times. Together, we will present the creation of a unique positioning to a target that shares the values of the brand.

Mind the gap: Elevating in-house research

THE J.M. SMUCKER Co

Heidi Carrion of the J.M. Smucker Company shares techniques to obtain credibility and better communicate insights, therefore elevating the value of in-house research.

5 steps to internal insight democratization

vimeo

This session we will explore five steps for democratizing insights within your organization and delve into five principles for successful insight democratization.

Doing more with less: How to leverage research technology for real-time insights

SightX

DIY insights tools aren't what they used to be. Discover how the next generation of #ResTech platforms are empowering organizations of all sizes to start, optimize and scale their research workflows, all while spending less time and money. Join SightX Co-Founder Tim Lawton as he demonstrates how to find your product's perfect packaging, best messaging and ideal customer segments efficiently and all within one integrated platform.

The agile research toolkit

Lincoln Financial Group®

This presentation highlights Lincoln Financial's journey to adopting and adapting a research toolkit to make research and insights relevant again. Most researchers have heard the stakeholder complaint that research takes too long, costs too much and doesn't have the desired impact on decision-making. How can market research functions leverage new technologies, evolve to keep pace with decision-making and earn its seat at the table as insights partners?

Starting with needs first... without thinking digital-first

RLM

In a world where digital is the default, it's important not to assume that every industry/category should adopt end-to-end digital or that every customer type wants a fully digital experience. Because in addition to access, the digital divide is also about desire and expectations. Instead of assuming digital is the answer and jumping to solve the solution, we need to start with considering the actual needs and expectations. The role of digital has to be defined at the point that industry and customer type meet.

Obstacles to home buying by race/ethnicity in a post-COVID market

National Association of REALTORS

The current real estate market is unlike any in American history and prospective home buyers are finding it more and more difficult to become home owners or to move into new homes. A lack of affordable housing nationwide was exacerbated by a rush for new and different homes during the COVID-19 pandemic. Meanwhile, homeownership rates among African American and Hispanic/Latino Americans remain well behind that of other racial and ethnic groups. The National Association of REALTORS® (NAR) conducted a study to help find out why.

Research really works

Mutual of America

Financial institutions are encouraging as many customers as possible to forego paper statements. Cost control, customer experience, the environment and data privacy are all at stake but how can a campaign come out of the gate with the best chance of success when your organization has no data records and no insights culture? Asking the right questions, executing fast, simple research and monitoring results can drive short term results and longer term culture change.

Defendable legal claims testing in one day for dimes on the dollar

Fruit of the Loom

Faced with a $65,000 outside vendor proposal and an almost nonexistent budget, I creatively offered to run a feasibility study for our Spalding team on 1Q.com – an always-on panel – to understand if they should pursue the legal claims testing. I piloted the test and the study certainly seemed worth it! The bigger surprise was that since I'd followed the best practices of legal claims testing, our legal counsel indicated that my initial study was defendable with a price tag less than $2,000!

Learn how to set up best practices legal claims testing for dimes on the dollar. Just like Bob Seger – our main job will be to determine "what to leave in and what to leave out." Become the darling of your legal department and hidden gem for your marketing department. Become your CFO's best friend all at the same time! All in one easy study.

CUTTING-EDGE SESSIONS, INNOVATIVE EXHIBITORS AND GREAT NETWORKING– AT A PRICE YOU CAN AFFORD!

How to outperform as a corporate research professional in 2022 and beyond

The demands on corporate researchers have never been greater. But what defines and differentiates truly successful corporate research professionals?

If nothing else, 2020 and 2021 have highlighted the need for corporate researchers to be business-focused innovative versatile and to execute with a commercial mind-set. These attributes (and many others) have become "table stakes" for leading research professionals who look to help drive their respective businesses.

Disruptive innovation: A new media measurement model that drives media ROI with Hispanic audiences

Center for Multicultural Science

A new study by The Center for Multicultural Science advances the Nativity-Based View (NBV), a new methodology which proposes that nativity is more effective than language in targeting and measuring U.S. Hispanic population. The results of the study show that U.S. and foreign-born Hispanics are not homogeneous in their media choices, suggesting that Spanish-language television is not the "best way" to target U.S. Hispanics. The study also finds that approximately 80% of Spanish-language television does not reach Hispanic millennials, suggesting that the NBV is a valuable planning and investment tool in targeting key segments of the Hispanic population.

Dynamic, interactive concepts: How Verizon is making more informed decisions

buzzback, Verizon

How do you test online in a way that replicates a real-life interaction, giving you results that better predict what consumers will actually purchase?

Working collaboratively, buzzback and Verizon have developed a way to test concepts interactively and dynamically. This methodology mimics real-world experiences, providing consumers more information than is able with a static concept. And because consumers can interact with the concept selections are more accurate and align more closely with market share.

GSK: The journey to cultural fluency

GSK Consumer Healthcare

Join Tina Tonielli of GSK Consumer Healthcare to learn about the company‚Äôs journey to improve its cultural fluency, leveraging cultural intelligence to drive business impact.

NETWORKING & FUN

Real Networking Technology

The Quirk's Event utilizes the technology-enabled Klik badges and app, offering easy and fast networking in a touch-free environment. Attendees in close proximity can quickly exchange information simply by both pressing and holding down the bottom of the badge. Bright LEDs will illuminate and flash, letting you know that the information has been exchanged. All your connections are stored in the app, allowing you to chat and reach out.

MR Jam Session

Check out the MR Jam Session in Chicago and New York for a fun evening of music and mingling. Quirk's will bring together a talented collection of MR industry musicians to perform a range of hit songs. The MR Jam Session is a great way to kick off the event and is included with your registration!

cocktails WITH QUIRK'S

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

Additional Networking

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

THE RESEARCH CLUB

WIRe WOMEN IN RESEARCH

Expo Hall Celebration

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Below is a list of just some of the corporate brands that attend the Quirk's Event.

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Grainger | Walgreens | Wendy's | Westfield | **Whirlpool** | Wizz Air Hungary | Worldpay | WWE Corp | Wyndham Hotels & Resorts | Xcel Energy | Yahoo |Zappos | Zillow |

– sending out all the links to the right people, ensuring nobody gets left off, getting GDPR consent forms done, potentially managing an online translator in parallel, for example. All are critical tasks but are often not visible to those outside the process. If these nitty-gritty jobs reside with the moderator – as can often happen – there is a danger of overburdening with a new sort of admin complexity. New roles are perhaps required within research organizations.

And there are still technical challenges that have nothing to do with operational efficiency and are difficult to anticipate. WLAN gaps happening in the middle of sharing a TV commercial, for example, or people dropping in and out due to technical bugs. These things are all disruptive, particularly live, but the show must go on. For the moderator this means learning to keep your cool and being able to improvise if unexpected things happen – above and beyond a cat (or something even more exciting!) walking into the picture.

Time to think? Finally, there is the aspect of everybody increasingly spending more and more time in front of the computer, clients and moderators alike. Days packed with back-to-back online meeting after meeting, with zero gaps in between, can certainly boost efficiency but that digital overload and excessive multitasking can lead to mistakes and burnout. Or simply not having enough time to sit back and sift through one's impressions, letting the jigsaw pieces of the insights puzzle fall into place.

This digital world contrasts for many moderators with their past experiences, memories of doing F2F work, getting on a plane or train, relaxing a bit during the journey, the rituals of grabbing a sandwich and coffee, plopping down in a hotel room late at night. These are largely gone. Some qual practitioners miss this – others are more grateful for the efficiencies digital offers.

The future

What does the future hold for qual, digitally empowered as it is? Crystal ball-gazing is often fun but much is characterized by uncertainty – witness COVID-19 mid-2019. There are clear megatrends – further digital transformation and AI, sustainability, etc. – that will continue to impact the qualitative practice but to say with confidence exactly how and where is near impossible.

Pragmatically, and based on our industry knowledge and observations, plus discussions with clients across numerous categories and geographies, we have identified a few key areas and issues that we believe will likely characterize the development of qual in the next two to three years.

Face-to-face. Digital is here to stay but it will coexist with F2F. As COVID-19 recedes, the decision on which mode or, more likely, which method mix to choose will be driven by the calculation of what's best for a specific brief. Digital has proven itself in so many areas but for some briefs there is no substitute for actually being there. Projects where the touch-and-feel aspect is so important, for example, or where we have to work with mockups that can't easily be sent to participants' homes. Also projects where sensory aspects such as weight or sound are key. Or for geographies where neither client nor agency has an adequate understanding of the culture and context. We still believe in such circumstances the added value of face-to-face will justify additional costs and travel.

If we were to risk a prediction – perhaps a wish – for the future it would be two-thirds digital one-third face-to-face. For certain tasks relating to creativity and innovation we think face-to-face may have unique advantages. Yes, digital software such as Mural has proved hugely useful and empowering in times of lockdown for innovation challenges. Most (if not all) of the principles of co-creation best practice (e.g., smaller groups, a sense of urgency and competition, time-boxing) work equally well online. However, there is an argument – driven by positive pre-pandemic F2F experiences and outputs – that physical presence and hands-on sessions are wonderful for stimulating creativity. Inspiring off-site locations definitely create a different environment that engenders different thinking and new mental approaches, with invariably rich outputs. The physical handling of prototypes also has benefits – sometimes we think with our body (in this case hands), not just our brains or eyes.

We see technology continuing to play a central role, especially given the backdrop of more people working from home (WFH). This is likely to stay with us – however many days that may be per week or month. As qual data sets (often huge digital files) become larger and larger, the online WFH transfer options – bandwidth – need to be smooth to ensure downloads can be done faster, especially from home offices. IT investments and upgrades will be necessary.

Understanding people. In qual, the human factor will remain central in making sense of stuff; the stories people tell us and the emotions they contain, subtle or obvious, hidden or on the surface.

The basics of qual – talking to people, interpreting the gap between what people do and what they say – will likely remain; interpreting that dynamic is the business of experts, human qualitative researchers. Insight-generation isn't done by the press of a button – yet. We look forward to the time, hopefully soon, where analysis processes can be truly simplified with the help of automation software, allowing researchers to get to the core tasks of drawing conclusions, advising strategically based on category knowledge and spending less time on low-level stuff like searching large data sets of videos for a quote or checking what was said exactly in a language (or dialect) one doesn't understand.

We monitor the accuracy and value of software tools constantly. Our prediction is that video in particular will play a larger role in how participants interact with researchers in future, over time supplanting the primacy of the written word. Analyzing the outputs in a cost-effective manner is one of the challenges where AI will hopefully help in the future.

The metaverse. While AI and how it works in practice currently dominates many MR qual discussions, there are other things cooking in the tech world, such as virtual reality/augmented reality and of course metaverse applications.

The metaverse is shaping up as the next big tech frontier and will likely impact entertainment, education, health care and also market research. Applications will provide a much more immersive digital option than current 2D screens. They will be particularly relevant for design testing and add a whole new social component, exploring not just new environments but also interacting with others. The potential for impact on qual explorations is huge.

Dealing with larger and different types of data sets is also an area we see as the future of qual. This means adding to the existing specialisms of social science, behavioral and psychological understanding an array of new adjacent disciplines: neuroscientific approaches or biometrics such as eye-tracking; working with specialisms such as advanced semiotics or applying a specific lens to analysis such as behavioral economics. And of course, integrating quant with qual will be a continuing trend. Thus, training and retraining will be core to future upskilling.

And who knows, maybe the qual specialist agency won't be known as such but rather as a strategic solution provider or strategic consultant/coach. Methods will become secondary to the ability to deliver solutions, advise strategically and handle all sorts of data with numerous approaches toward the ultimate goal of providing actionable insights.

Changes on the client side are of course a constant and probably overall the key driver. We read a lot about in-sourcing and DIY. For qual, this is definitely an area we see growing. With certain projects we train clients in the basics of interviewing good practice, how to ask questions, to avoid bias, for example, so they can do their own exploratories or mini-immersions. How often this actually happens, given the hectic schedules and full agendas of many clients, is open to question.

We equally see a growth in secondary research briefs, clients asking us to help them with meta-analyses, evaluating and summarizing knowledge from existing data banks – again, despite the possibility of software existing to help with such tasks. The human intelligence brought to bear on a strategic challenge, to distil and recommend appears to remain critical and highly valued.

Finally, the major shift on the client side is (of course) digital transformation. Whole departments are being created, whole company cultures and processes are changing rapidly. This will continue to impact the type of briefs qual agencies receive – more and more new digital formats, likely ever shorter.

And during times of uncertainty, the need to understand changes in how consumers want to shop, the so-called decision journey, what the interplay is between digital options and face-to-face, will remain high. Analytics can be powerful but if people's behaviors shift, then the assumptions underpinning a model need fresh data. Cue hypothesis generation, cue qual research.

Remains exciting

There is a lot more to say and explore. But we will pause – in the hope that you have followed us to the end. The future of qualitative research, both digital and analog, remains exciting and we believe digitally enabled qual will play a huge part in it.

Katharina Ladikas is senior project director and Edward Appleton is director global marketing and sales at research firm Happy Thinking People. They can be reached at katharina.ladikas@happythinkingpeople.com and edward.appleton@happythinkingpeople.com, respectively.

b2b research

Advice from a friend

Report outlines tips for creating effective B2B thought leadership

| By Joseph Rydholm

snapshot

In survey, decision-makers tell Edelman and LinkedIn what adds value to B2B content.

Add thought leadership to the list of things that the pandemic has disrupted.

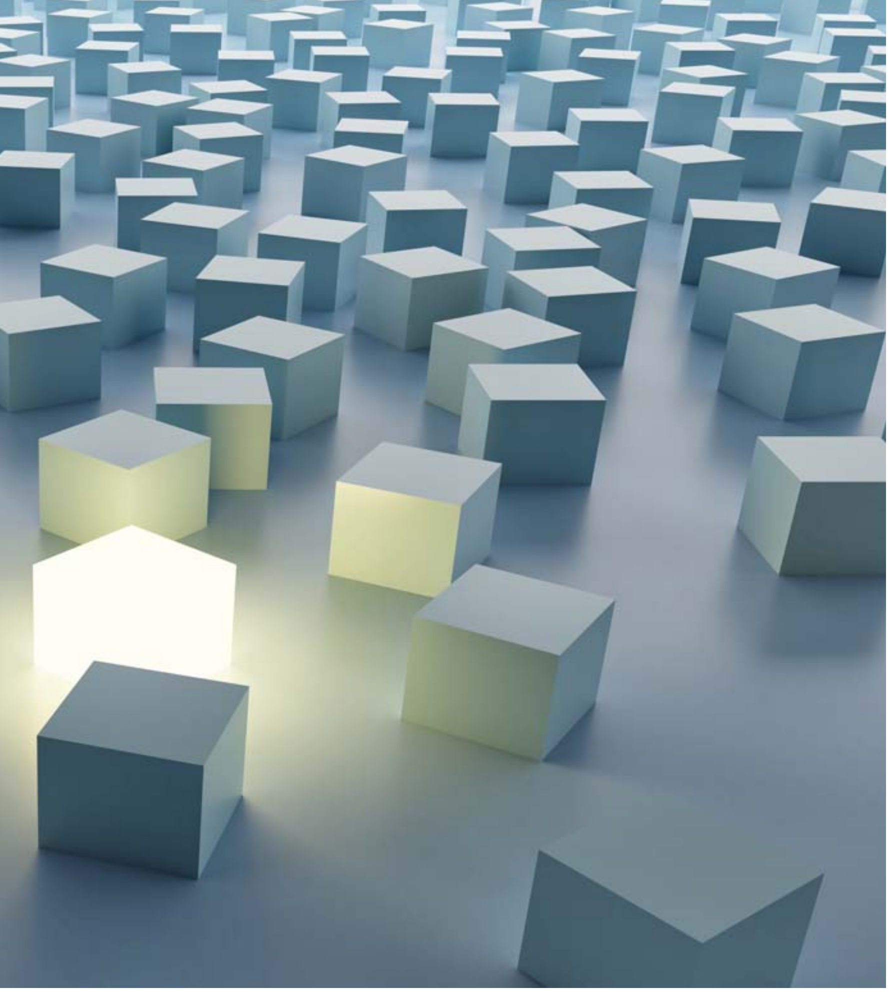
For the fourth edition of their study of thought leadership and its impact on B2B decision-makers, Edelman and LinkedIn conducted research last summer with nearly 3,600 management professionals across the U.S., U.K., Canada, Singapore, Australia and India who consume thought leadership and found that a pandemic-induced glut of content has diluted their sense of thought leadership's value.

The report doesn't delve into the reasons COVID-19 has seemed to open the floodgates of digital content intending (or pretending) to be thought leadership. It could be panic (regular marketing channels aren't working the same since the whole world has been upended!), it could be cost (our marketing budgets have been slashed ... quick, what's a cheap way to get our name out there?) or it could be laziness or ignorance (Company X does a nice job with its thought leadership ... how hard can it be?).

Regardless, 66% of those surveyed noticed the increase and 38% said there was too much content/more content out there than they could reasonably consume. And yet, over half (51%) said they spend more time consuming thought leadership than before the pandemic began. While 54% of decision-makers (and 48% of the C-suite) said they spend more than one hour per week reading thought leadership, 71% of decision-makers said that less than half of what they read is useful to them.

The report (https://bit.ly/3G3UowK, registration required) cites three other main findings.

Thought leadership remains critical to customer engagement but breaking through the noise is harder than ever. Thought leadership can certainly have an impact – when it's done right. The 2020 version of the study found that 54% said that after engaging with an organization's thought leadership they purchased a new product or service that they hadn't considered buying. Fifty-three percent decided to increase the



amount of business they did with the organization and 48% awarded business to the organization.

Among the top reasons for consuming thought leadership are: keep up with the latest thinking in the sector (71%); stimulate thinking and generate new ideas (71%); gain insight into trends set to impact the organization (68%); understand trends currently affecting the organization (65%); and discover new products or services that might help the organization (47%). (While that last number is not insignificant, it might surprise the shockingly high number of companies that wrongly use and view thought leadership as a blatant sales tool. Do they really think most readers want to spend their valuable time being sold-to instead of being informed?)

Quality-wise, most (55%) thought leadership seems to land in the middle somewhere, according to those surveyed. Fifteen percent rated the overall quality of the thought leadership they read as very good or excellent and 30% rated it as mediocre, poor or very poor.

Earning trust and credibility with decision-makers requires strong thought leadership – especially if you are not an established market leader. Companies, organizations and brands with demonstrated track records of delivering top-quality thought leadership obviously have a leg up on newcomers to an industry but the study found that thought leadership is an effective way for upstarts to make a name for themselves. Over half (53%) say it is important for small companies to produce thought leadership if they want to interest buyers in working with them. Sixty percent of buyers say it builds credibility for new entrants and 57% say it builds awareness. And 47% say thought leadership led them to first discover and later purchase from a company that was not generally seen as a category leader.

Sixty-four percent of buyers put more stock in the trustworthiness of a company's thought leadership content than its marketing materials and product sheets and 63% say it's important in providing proof that the organization understands and can help solve business challenges.

The study also notes the role/value of thought leadership as a vehicle for shedding light on and fostering discussion about business-related topics that might be getting overlooked by media outlets that are now more focused on reporting the impacts of the pandemic and attempting to do so with newsrooms gutted by COVID-19-inflicted budget and personnel cuts.

High-performing thought leadership strikes a balance between being authoritative and provocative yet human in tone and even fun. So what are the keys to doing thought leadership right? (Well, first, leave the selling to your sales team – that's what you hired them for, after all.)

- Don't let your content get weighed down by gravity. Inject a little tastefully done fun into the proceedings: 87% of those surveyed said thought leadership content can be both intellectually rigorous and fun at the same time. When it comes to tone, respondents prefer a more human, less formal voice (64%) to an even-toned intellectual voice (36%) and a strong authorial point of view (67%) over a broader, more generalized POV (33%). "Thought leadership has evolved from a one-way broadcast to conversion and community. It requires authenticity, having a point of view and delivering something of value. Value can come in the form of insights, inspiration, imagination, help – even entertainment," says Kevin Marasco, CMO of Zenefits, in the study report.
- Make it matter. Forty-seven percent of buyers surveyed said that most thought leadership doesn't feel like it was created to meet their specific needs.
- Be provocative, authoritative and relevant. Respondents were shown a series of pairs of descriptors for thought leadership and asked to indicate which of the two they most preferred. At 81%, "offers provocative ideas that challenge my assumptions regarding a topic" bested "validates my current thinking"

(19%) by a wide margin. When asked who they preferred to hear from, 77% selected deep subject-matter experts delving into specialized topics over senior executives speaking to high-level business issues (23%). In terms of sources to back up the insights being presented, 80% preferred "third-party data and insights from other trusted organizations or people" to "only proprietary insights from the company that published the piece" (20%). And the insights have to be real-world rather than pie-in-the-sky: 62% say they prefer a "focus on analyzing current trends that are likely to be affecting my business today" over a focus that is "more speculative and discusses where things might be going in my sector/industry in the future" (38%).

- And perhaps above all, resist the urge to sell. When asked to detail the most prominent shortcomings of low-quality thought leadership they had seen recently, 46% mentioned it being overly focused on selling or describing products rather than conveying valuable information; 40% cited unoriginal thinking or a lack of new ideas; 31% said it was authored by people who are not true subject-matter experts; 29% said it failed to support its arguments with high-quality data; and 23% said it was too staid or "corporate" in tone.

Hungry for new ideas

I personally found the report's recommendations validating, echoing as they do what we here at Quirk's have been stressing for over 35 years to the research companies that engage in thought leadership by writing articles for us and speaking at our annual slate of Quirk's Events. The urge to sell and self-promote is a powerful one – and, though regrettable, often understandable if the vendor-side author or speaker's company is focused on generating leads rather than enhancing credibility. But as we have long told our content contributors on the vendor side, readers or audience members don't want a sales pitch. They're hungry for new ideas and new perspectives. They want to learn, to get some value from the time they invest in experiencing what you have to say.

You can't build a reputation for delivering quality thought leadership overnight. It takes time – which again, in some bottom line-driven organizations is not available. It also takes real effort and real motivation. In business-to-business, as the Edelman/LinkedIn report shows, the best, most effective thought leadership communicates a sense of authority that transcends the typical social media-based influencer. If readers truly feel like they are drowning in poor-quality thought leadership, the best way to earn their trust (and eventually their business) is to throw them a lifeline by offering stimulating, substantive, well-sourced material that helps them feel smarter after consuming it.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••• b2b research

Make it matter

B2B surveying in the time of COVID-19

| By Doug Berdie

snapshot

Doug Berdie offers tips for adapting your B2B research to an era of changing work and workplaces.

COVID-19 has had a profound effect on almost all phases of life. Marketing research is not exempt. B2B researchers on both the client side and the supplier side have felt the burdens of new challenges to obtaining quality research results necessary to guide sound decision-making.

High rates of employee turnover and staffing shortages, coupled with reduced discretionary time on the job to do things like complete surveys, mean that a precise focus on proven research tactics is needed to use B2B research effectively. B2B research (as well as consumer research) generally consists of five specific activities. Let's review each of them with a particular emphasis on how they can be conducted successfully in these new and changing times.

Sample selection

One of the most difficult steps in B2B research is ascertaining which people have the information you wish to collect. Decisions affecting, for example, criteria used to purchase the products/services you provide could be totally made by upper management, totally made by people in the purchasing department, totally made by those who actually use the products/services of interest or made by some combination (varying for each client company) of those and other people.

And, with the high rate of absenteeism and turnover due to the pandemic, it's even more challenging to identify which people occupy those positions. Hence, rather than just trying to contact people you've gone to before, it's imperative to have the people in your organization who actually deal with those clients help you identify who, at that moment, has the information you want. These could be salespeople in your organization or people in other departments. The job titles of who best can identify who should be surveyed will vary from one company to another. It's wise to have the person in your organization who deals with the targeted person verify with that person that they are still the one you should contact and

let them know they will receive a contact. When your person does that verification, be sure they indicate the research will be very fast.

During these stressful times, I'd recommend a carefully selected sample of people and keeping the number surveyed to the minimum needed to receive reliable, stable data – rather than mass-mailing out huge numbers of surveys. Keeping sample sizes reasonable allows resources that would otherwise be used on overly large samples to be directed to the response rate-enhancing techniques described below. It's axiomatic that high response rates from smaller samples (as long as they are large enough) yield better data than massive numbers of results from an unrepresentatively large, low response-rate sample.

Also, you may wish to consider two separate samples: 1) a sample from among your very best customers (i.e., those you most wish to retain); and 2) a sample from less-important customers (in terms of revenue) but who may have promising potential in terms of increased sales. That way, with a smaller overall sample, you'll still be sure to get a good read on those two important segments.

Questionnaire/data collection design

Your objective should be to limit any questionnaires to the shortest possible length – as a way of acknowledging the times we live in. And, if there are some types of data you can obtain from means other than surveying, try to get them that way to help keep questionnaires as short as possible.

Most B2B research is interested in the following general types of topics:

- relative importance of criteria used to select type/brand of product (including availability, price relative to the past and competition, distinguishing features, past experience with supplier/product, etc.);
- relative importance of product/service usage characteristics;
- new product/service features that would be attractive.

Now, when people's time is limited, it's best to pare questions to only the most essential. The above outline could be transformed into three rating scales, all which could fit on one page, using a format such as shown in Figure 1.

And, if you wish, you could add one open-ended question at the end, something to the effect of: "Please describe any of your above ratings that are different than they would be if there were no COVID-19 situation."

If you are trying to reach end-use consumers through your channel partners, you may wish to offer a variety of questionnaires tailored to specific needs those channel partners may have. For example, if you wish to survey auto dealer customers, a common-core set of a few questions, coupled with a couple the dealer can choose, will provide the most helpful feedback. For example, if a dealer has just overhauled the service bay, the dealer may want feedback on that, whereas other dealers may have some other area of special interest.

Also, given the pandemic situation and uncertainty about how long it may last, you may wish to ask a series of short questions (perhaps, on a one-time basis or even to just a subset of people) like those shown in Figure 2.

You could also add a simple open-ended question such as: "Please describe any actions you

Figure 1

Using a scale from 1 to 5, where 1 is "Not at all important" and 5 is "Essential," please rate how important it is that your office printers:

	Not At All Important (1)	(2)	(3)	(4)	Essential (5)	Don't Know (98)
Be compatible with all brands of computers	1	2	3	4	5	98
Can be upgraded easily when new computer operating systems are installed	1	2	3	4	5	98
Work as well with generic printer toner as with toner provided by the printer manufacturer	1	2	3	4	5	98
Have a printer speed of at least five pages per minute	1	2	3	4	5	98
Print documents from all software packages equally fast	1	2	3	4	5	98

Figure 2

Using a scale from 1 to 5, where 1 is "Much more difficult than before" and 5 is "Much easier than before," please rate how difficult or easy the following aspects of ordering and delivery are for you:

	Much More Difficult than Before (1)	(2)	The Same as Before (3)	(4)	Much Easier than Before (5)
Knowing who to call to place your orders	1	2	3	4	5
Keeping updated as to when your orders will arrive	1	2	3	4	5
Getting advance notice of price changes	1	2	3	4	5

are finding effective for dealing with any changes you have indicated."

Survey administration process

Given the COVID-19 situation, it's nice to let recipients decide for themselves when it's a convenient time to take a survey. Consider using a mail survey, with all the tactics that enhance response rate, such as:

- Survey and very short cover letter enclosed in a #10 business envelope that has the recipient's name individually typed on the envelope and that uses an actual postage stamp (if a commemorative stamp exists celebrating the topic of your survey content, use that);
- Postage paid #9 return envelope – again, with a real postage stamp affixed to it (as opposed to metered or business-reply postage);
- A mail follow-up reminder sent five to seven days after the original mailing. If you can do something fun (or funny) with the follow-up, it's likely to enhance response rate. And, of course, another #9 envelope should be enclosed with the follow-up, with an actual postage stamp on it.

If you have the intended recipient's home address, sending the materials to that address may be more effective than sending them to the work address, especially given how many people are currently working from home. It's rare enough these days to receive something in the mail at home that trying that approach may increase interest in opening the envelope. It also lets recipients complete the easy task at their leisure.

Data analysis

Given the shorter questionnaires and limited sample sizes needed these days, complex and time-consuming multivariate analyses will likely neither be possible nor helpful. Hence, rather straightforward descriptive analyses should be considered which, also, allow for faster feedback to management to facilitate timely decisions about improvements to make.

B2B post-survey follow-up

A best practice is to send those who responded to your survey a follow-up thank-you. And, it's also a good idea to send a subsequent follow-up letting them know of the specific actions you will be taking based on the survey feedback and how they can expect to benefit from those actions.

Keys to success

B2B marketing research is challenging even in the best of times. However, with the personnel turnover, limited discretionary time and more people working remotely (all resulting from COVID-19), the challenges are even more formidable. The keys to success will be 1) making it as quick and easy as possible for people to participate; and 2) limiting the content of the research to only what's most important for you to learn while also showing respondents that you intend to act in ways that will benefit them.

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••• b2b research

Understand and overwhelm

How to create raving fans in B2B markets

| By Alan Hale

snapshot

Why research must be a major driver of your company's effort to foster customer happiness.

In business, the general consensus is that acquiring new customers is five to seven times more costly than keeping your existing ones. While customer acquisition is indeed important, so is holding onto your current customers and turning them into raving fans.

As defined by Ken Blanchard in his book, "Raving Fans," a raving fan is a customer who is excited about your product, service or solution. Think of Apple and Tesla; these companies have waiting lists and long lines for new products. Raving fans are your brand advocates and are an extension of your company and its offerings.

For those who haven't read the book, the characteristics of raving fans are as follows: they are extremely loyal and less likely to defect to a competitor; they will buy more; they are more likely to buy new products, services or solutions offered in the future; they are usually (not always) less price-sensitive and therefore are more profitable; they may give insight on possible new products, services or solutions; they often refer you to other friends and colleagues and/or provide testimonials.

Learning about your customer and their needs via market research and interactions with them is the foundation for making them into raving fans. Once you understand the needs and wants of your stakeholders in large key accounts, then you execute initiatives to endear yourself to the people who use your products or services.

I have been fortunate to have managed over 50 engagements on customer satisfaction and loyalty across a wide variety of industries. Based on this experience, I wanted to share some insights on using a research-based framework to create raving fans. Most of the following is applicable to both B2C and B2B, with the exception of the 80/20 rule, which is explained later.

Validate your customer segmentation and value proposition. If these are not correct, it will be difficult to impossible to create raving fans. For example, if you are selling a product with bundled service at a higher price point and the customer has their own internal technical support team, you most likely will not be successful. If you have a brand-new instrument

and it is more difficult to use, you will likely fail. Use market research to understand if you are delivering the right value propositions. Why will the customer buy your product, service or solution over the competition?

Concentrate your effort by focusing on the 80/20 principle. In B2B, conventional wisdom is that 20% of your accounts make up 80% of your revenue. So, if you have 1,000 active accounts, there are 200 that your business depends on. Spend the bulk of your research dollars and effort obtaining insight from these top accounts. Another way to look at it is if your No. 1 account defects, how much turmoil would your business be in? Concentrate on over-servicing these key accounts.

Start by listing your accounts in descending order of revenue in a spreadsheet. When you hit 80% of your revenue, you have defined your top major accounts. These are your "gold" customers. Next, add large accounts that have either walked away or have significantly decreased their purchases with you. Then, add to that any accounts that you legitimately believe (not just based on the salesperson's opinion) can evolve into a large account. Finally, add key target prospects who might grow into large accounts. This is who you should be trying to understand in order to deliver outstanding service.

Identify the stakeholders in each account, those who use the product or service, those who specify the product and those who make the purchase decisions. Usually, every key account has two, three or more key stakeholders. It could be the user, the specifier and the person who purchases. For a plastic-bottle manufacturer, for example, it is the packaging engineer, purchasing and marketing.

Get out of your chair. Go out and visit customers. Listen to your them. This is the absolute foundation for creating raving fans. You need to obtain insights that are seldom delivered from web-based surveys. Ask them: How are we doing? How do we compare to our competitors and your best-in-class vendors? What else should we be doing?

This is how Lou Gerstner changed the culture at IBM when the firm lost its way. In my opinion, it is negligent to not call on customers to determine how you can improve.

Implement the 10/30/90 rule. The CMO, VP marketing, VP sales and marketing or marketing director should visit key customers every 10 days or once every two weeks. Customer listening should be 10% of their time. Other functions like engineering, new product design, customer service and billing, etc., need to visit a customer a minimum of once every 30 days and talk and listen to the stakeholders. What improvements can we implement? What can we do to make you a raving fan? Even members of the C-suite can call on a key account every three to four months.

Supplement these personal interviews with other qualitative research. Include a variety of diagnostic questions in order to assess the current health of the client, uncover root causes for unhappiness and prescribe the key actions to work on. I am a strong believer in using qualitative VOC discovery research to obtain insights – the whys. This can be a combination of focus groups, in-depth phone interviews, personal interviews, ethnography and other qualitative research methodologies.

Let's talk about the pros and cons of web surveys. Web surveys are inexpensive to administer, quick to get feedback and help to make the qualitative data more robust or even statistically significant. I have had numerous discussions with colleagues about statistical significance. If you are surveying into 80% of your sales in a B2B setting – for example, the previously mentioned 200 accounts out of 1,000 – you are not statistically significant on a pure number of accounts basis but you are obtaining insights into 80% of your revenue. Which is more important? Of course, it is the 80% of sales. B2C service providers sometimes have a difficult time with this concept because it challenges their paradigm about statistical significance.

Web surveys are easy to fill out but do not provide the insight, as well as the whys, with or without artificial intelligence. When you add qualitative questions to web surveys, a few things may occur. First, very few respondents take the time to fill the information out. Second, they use two or three words with little elaboration. Sure, you can use AI to count how many times "responsive" is mentioned, but if a respondent says, "They get back to me quickly," there's no way for the word "responsiveness" to be picked up and categorized as “responsive.” And word clouds are not insight. They are a visual way of showing the frequency of words cited.

When you do qualitative research, it is like peeling the onion to get to the issues that matter most. An example:

“What is our performance rating for delivery?”
“It is a 5 on a 1-10 scale.”
“Why?”
“The truck is late.”
“Can you further explain?”
“Yes, the truck misses the two-hour window.”
“Why is that an issue?”
“We have a small loading dock and lots of trucks.”
“How can the client deal with this better?”
“It would be great if they called when they are running late.”

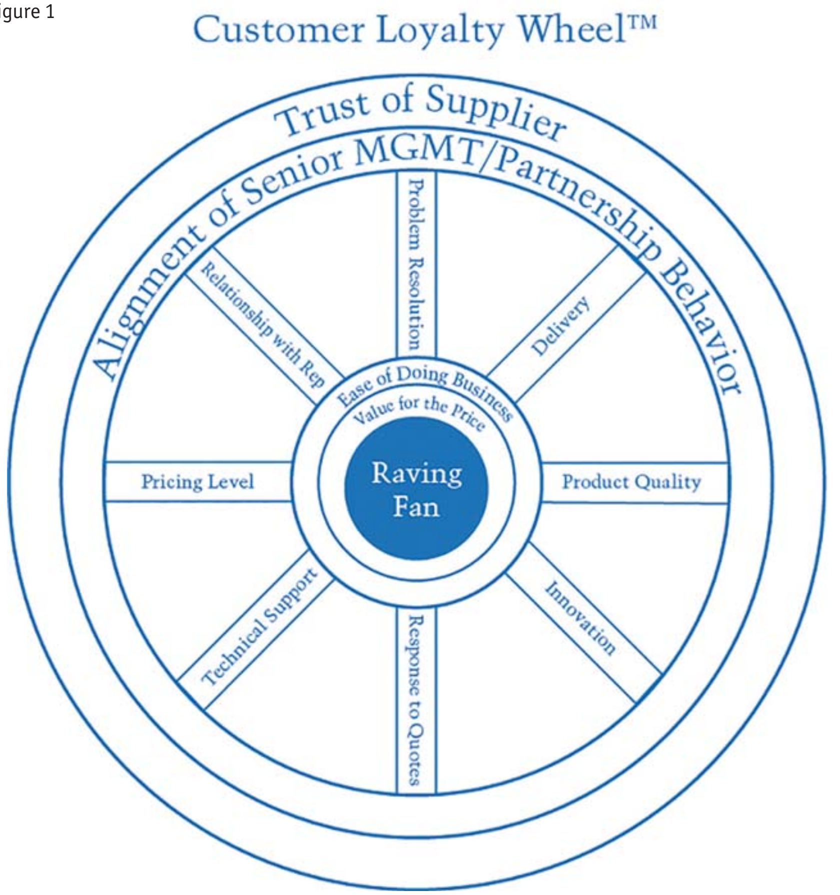
There is a place for web surveys but only after the qualitative research has been completed, at least for B2B research. We prefer to use them as a way to collect information from the non-key accounts. From a B2B perspective, spend the research dollars where they have the most impact – your largest accounts.

In B2C, with millions of customers for a product like bleach or toothpaste, it makes sense to start with quantitative research to tease out opportunities where you then utilize qualitative methodologies.

Use a mix of Net Promoter Score (NPS) and CSAT in your market research methodology as well as qualitative and quantitative questions. There has been a lot of bashing of NPS lately in magazines and posts in business and social media claiming it is not actionable. Well, if you use it incorrectly, it won’t be actionable. I hear comments such as, “We have a 27% NPS, now what do we do?” Who knows? If you did not obtain the reasons behind it and how to improve, all you have is a number. If you try to use a hammer on wood screws, it won’t work. Don’t blame the tool.

In our opinion, NPS is very valuable because it measures the relationship using personal risk of recommending. It measures the overall relationship and not a specific transaction. The NPS number is a benchmark and checks on your relationship progressing over time. The real value is in determining the insights and crafting actionable tactics and strategies for each key account that will drive the number up. We have used NPS to predict accounts that will defect as well as those that will buy significantly more in the near future.

Figure 1



In general, it is critical to get the importance level of each criterion as well as our performance score in order to prioritize efforts. If the customer is willing to discuss the competition, the insight obtained will be valuable in showing how you much you need to improve versus the competition, as well as the best-in-class vendors. Ask your customers what actions they would recommend you take to improve during the course of the research.

Figure 1 shows the Customer Loyalty Wheel, which is a framework for looking at customer satisfaction, loyalty and the creation of raving fans. It all begins with trust and alignment and ends in creating raving fans. Several elements of the wheel are addressed in further detail below.

Trust. If the supplier continually breaks its promises, there is no trust. The relationship will not deepen and might eventually be terminated.

Alignment. Are your values aligned? Are your objectives aligned? This information is best revealed by market research and executive discussions.

Quality. Quality is table stakes in any business. If your product does not perform according to your specifications or breaks down too often, the account will find another supplier. We had a client who moved its production overseas to reduce costs and increase margins. The client could not understand why it was losing business but customer research showed quality was very poor and the product frequently broke. In instances like this, research can be used to determine the frequency of product issues, their significance and how this compares to your competitors. If you are 30% of their purchases for this product category and have 60% of the quality problems, you are on dangerous ground.

Risk. Pre-sale, it is important to reduce or minimize the risk factor, so the customer is more likely to buy. When you buy the wrong toothpaste, your family might be disappointed. When you buy the wrong CRM or ERP system at work, you could be fired. We had a client who manufactured materials for road construction. When civil engineers were interviewed during market research, they wanted to make sure these materials would withstand heat-thaw cycles for 10 years! When pressed further, they said that tests from an independent lab and having a municipality use the product for two years on heavy-traffic roads in a climate that

experienced extreme heat and extreme cold would help reduce their risk.

Be easy to do business with. Don't be a difficult supplier. Exchange the defective product, have customer service solve the problem, issue accurate invoices. Train customer service, give them the power to make decisions up to a certain level. Everything being equal, a customer would rather give business to someone who is easy to transact with. Conversely, if you are 10% of their purchases and 50% of their problems, expect the possibility of being terminated. Everyone has situations come up; just make them easy to resolve. There is research showing that customers are more satisfied when a vendor heroically solves a problem versus having no problem at all. (Though of course we don't recommend trying to game the system!) Use market research to understand how you compare to the competition in ease of doing business.

Be responsive and proactive in communications. If, for example, you know you are going to have a delivery problem, call the customer. Isn't that a novel idea? Nobody likes surprises but if you communicate with them, they can make other arrangements and adapt. Whether it's sales reps or tech support taking days to return customer calls, many companies do not want to admit that there are problems with their communication. They hope the problems will magically go away. But sometimes it's the customer who goes away.

New product development. It all starts with the customer. Use market research to determine if your product is filling a need or want, if it is a disruptive product or a me-too product. Think of research as an investment, one that helps you get your product or service launched quicker, leading to earlier profits. We are constantly astounded by the number of companies that develop new products driven by engineers without any significant customer input and then wonder why the product fails. We once had a client that had a new commercial ceiling grid system. It was beautiful and architects loved the appearance. The problem was, the general contractor would not award our client the project as the subcontractor was higher than the bids of other installers because installation of this product required 15% more labor. Higher labor costs = less profit. No one had bothered to get the input of the ceiling installation contractors.

Ease of use/UX. The customer needs to find the product easy to use. A maker of sophisticated lab instruments introduced a next-generation product that was far more accurate than anything currently on the market. But it was harder to use and required frequent calibration from a third party. The client had neglected to obtain the input of lab technicians. Using a combination of phone interviews and ethnography, we were finally able to understand the perspective of the end user.

Partner or just another supplier? It is important to use research to determine if you are perceived as a partner or as a supplier to your accounts. How do your customers and channels view your organization? If your product is insignificant, like a valve, for example, users don't want or need a partner. But if it's a crucial product, such as a stainless-steel pump on a pharmaceutical skid or a plastic bottle for a soda-filling line, you're a partner. If you achieve partner status, ask how you can help them help their own customers implement their objectives. This will set you apart from the competition.

Price. Price is important but more often the real factor is value. Rolex and Timex each have different value for the price. Some customers want a Timex, some want a Rolex. Our formula for defining value in the mind of the customer is as follows:

$$\text{Value} = \frac{\text{Benefits +/- Customer Experience}}{(\text{Cost + Risk})}$$

If you reduce costs or risks at the same benefit, the value goes up. If the costs or risks stay the same and you increase the benefits, the value goes up. It is truly in the eyes of the customer. CPG companies do a much better job at identifying how to add value than many B2B companies. Obviously, you need to use research to define these variables based on the mind-set of the customer.

Use other data inputs. This can include tracking purchases of key accounts over time, analyzing comments from salespeople, call reports, assessing commentary on websites, customer comments on chat rooms, IVR or social media, etc.

Conduct exit interviews with accounts who defected. Why did they leave? Do not assign this task to the sales rep; it is too important. You need to uncover and internalize learnings so you don't make the same mistake again.

Map the buyer's journey and moments of truth. The objective is to walk in the shoes of your customers and observe experiences, how they make decisions, etc., as well as how your employees interact with them. Great experiences create raving fans. Bad experiences create brand assassins.

One needs to plot the buyer's journey pre-sale, during the transaction and then post-sale. What are the most important activities or interactions? How do they search out and evaluate potential vendors? How did we do? Where can we improve? How can we make their search process easier?

I have found many companies are good in both the pre-sale and transaction phases but they often stumble post-sale. Lack of sufficient customer service and technical support creates dissatisfaction. Companies treat customer service as a cost center, appearing to not want to spend on the back end since they've already made the sale.

Close the communication feedback loop. Deliver account-specific information to the sales rep and then go back to the account and ask, "This is what we heard, is this correct? What else are we missing? How can we improve?" Create an action plan customized to that account. "This is what we are going to do. We will meet every quarter to see how it is going." Communicate your performance to the rest of your employees.

Design actionable strategies and tactics in general, as well as for each major account. The CEO needs to drive this across the organization and across silos. It is not owned by marketing, it is owned by every employee in the organization. Each large account should have a high-level advocate.

Making progress

Creating raving fans is a journey, not a destination. Stick to your process so that your research becomes a smart investment rather than just a cost. Measure every 18-24 months after you launch initiatives to ensure you are making progress. After this audit, modify the initiatives accordingly. We wish you much success in your own journey!

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••• media research

Connecting with the cordless

Best practices for marketers in video streaming

| By Jason Wiese

snapshot

The Video Advertising Bureau's Jason Wiese offers insights on the opportunities presented by the pandemic-fueled growth of video streaming.

According to findings from a recent Video Advertising Bureau (VAB) report, Reaching "Corded" and "Cordless" Audiences Through Video Streaming, the collective number of cord-cutters and cord-nevers has nearly doubled over the last three years – with cordless audiences now accounting for 44% of adults vs. 23% in 2018.

While this shift began pre-pandemic, COVID-19 served as an accelerator, with 92% of cord-cutters and 86% of cord-nevers now actively streaming. In addition, 60% of cordless audiences have added a new streaming service over the last year.

Within this landscape, there is a growing incremental reach opportunity for marketers, particularly in their efforts to engage those consumers previously deemed hard-to-reach.

Watch what they want

Cord-cutters and cord-nevers do not distinguish between linear or streaming. To them, all TV is TV, since viewers now habitually watch high-quality, TV-like programming across a variety of platforms and devices via different connections. People watch what they want, whenever they want.

Therefore, it's no surprise that cordless audiences are attracted to streaming services that offer professionally produced programming featuring enriched storytelling and character development. People are gravitating towards platforms that provide a diverse, high-quality library of content of TV shows and movies, representing the classics and the new as well as exclusive originals.

As connected-TV household penetration grows while services continue to proliferate, viewers are increasing their use of ad-supported streaming platforms – whether through TV network apps, Hulu or YouTube TV, or through a free ad-supported streaming (FAST) TV like Pluto or Tubi.

In fact, over one-third of cord-cutters and cord-nevers use a FAST

service, reflecting increases of 38% and 48% over the last three years, respectively.

Willing to accept advertising

Viewers understand that it costs money for content producers and distributors to develop a consistent pipeline of premium programming so they are willing to accept advertising as part of their viewing experience. Further, data shows that 62% of adult video streamers prefer watching free content with ads rather than paying for a commercial-free subscription service.

In addition, viewers appreciate the ability of these digital-native platforms to specifically target them with ads based on their behaviors, buying habits and viewing history. These advanced targeting methods deliver more relevant and memorable ads, resulting in a greater likelihood of sparking consumer action.

In recent years, those previously hard-to-reach cord-nevers – who are now prevalent across ad-based services – have shown to be an especially engaged audience for advertisers to reach through streaming, as they are more likely than traditional corded audiences to believe that the ads they see are relevant and memorable.

Eight best practices for marketers

The growth of streaming is driving business results through expanded incremental reach opportunities in ad-supported services, greater engagement fostered through premium programming in brand-safe environments and more precise, data-driven targeting that delivers relevant creative with the right message at the right time to the right person.

At the VAB, we have assessed in-depth how today's most innovative brands are using streaming to drive results within their multiscreen video campaigns. From this assessment, we have found that there are eight best practices that marketers are implementing in their streaming campaigns to drive KPIs. These strategies are:

- Leverage first- and third-party data and viewership behaviors to create custom target(s) and discover new audiences.
- Execute an audience-based buying approach that segments viewers beyond traditional demographics like age and gender by targeting consumers based on behavioral, attitudinal, lifestyle or purchasing data.
- Embrace over-the-top (OTT) across platforms and devices – connected TV (CTV), desktop, mobile – to maximize reach.
- Tailor creative to deliver the right message to the right audiences and consider tactics such as frequency-capping and sequencing multiple messages to further increase engagement.
- Utilize geotargeting to reach best prospects whether you're a local, regional or national advertiser with priority-focused markets.
- Partner with trusted measurement companies to evaluate campaign performance across your desired metrics.
- Understand which outcomes are most important to your objectives; if you're a first-time streaming advertiser, consider running a test-and-learn campaign to gauge which metrics and platforms are performing best.
- Analyze results and optimize to your desired outcomes for both current and future campaigns.

Ask themselves important questions

Further, in the implementation of those strategies and depending on their brand objectives, successful marketers will ask themselves important questions that help inform and guide their campaigns. Those questions include:

- How do we use streaming to extend the reach of our video campaign beyond linear TV?
- How do we use video streaming to boost sales?
- How do we use streaming to increase our

share of voice?
- How do we use streaming to reach new audiences?
- How can we make an impact at a local level with streaming?
- How can we use streaming to build brand love?
- How can we drive in-store traffic with streaming?
- How can we use interactive ad units to motivate consumer action?

Below are case studies, which are among the examples highlighted in our report, Stream On, which explores how video streaming drives brand success.

Automotive case study (platform: Tubi)

A luxury automotive advertiser wanted to extend the reach of its video campaign beyond linear TV. Tubi partnered with measurement and attribution platform TVSquared, which combined automatic content recognition and digital measurement to understand the incremental reach that Tubi offered. The brand began embracing OTT to maximize reach while also partnering with trusted measurement companies to evaluate campaign performance. The advertiser also made sure to have a comprehensive understanding of what outcomes were most important to its overall objectives. All of this resulted in Tubi and TVSquared identifying that 89% of the auto advertiser's audience was incremental to linear investments, while only 3% of media volume overlapped between Tubi and linear campaigns.

Tax services case study (platform: NBCUniversal)

A leading tax services provider wanted to improve its conversion for its services online and in retail locations. Using addressable advertising, an audience-targeted campaign launched aiming to reach a custom competitor target modeled from the client's first-party data across NBCU. Targeted impressions were delivered dynamically as viewers watched NBCU's full-episode player content across their owned-and-operated CTV apps, set-top box video on demand and Hulu. The tax services provider found a drastic lift for tax filings. Comparing numbers from 2019 to 2020, this campaign was +66% more efficient in cost per conversion and had a +2.5% higher tax filing conversion rate. The brand achieved success by implementing audience-based buying, embracing OTT and utilizing geotargeting.

Quick-service restaurant case study (platform: Hulu)

A quick-service restaurant brand aimed to drive sales through personalized messages prompting user engagement. Hulu delivered selected audiences GatewayGo ads that allowed this goal to be accomplished by prompting users to open a push notification, open an e-mail or scan a QR code. The brand found that audiences exposed to the interactive ad units saw a 3x lift in purchase rate. The best practices implemented in this cross-screen campaign were: creativity in messaging to the right audiences; partnering with trusted measurement companies; and optimizing the outcomes for current and future TV buys.

Expansive opportunities

Throughout today's video ecosystem – which consists of companies including Hulu, Tubi, Effectv, Ampersand, NBCUniversal, ViacomCBS, Spectrum Reach, Xperi and TiVo – there are expansive opportunities for marketers to work with these programmers and distributors, alongside data, analytics and measurement companies, to assess challenges, identify solutions and ultimately achieve results.

The year ahead presents a number of exciting and significant trends making an impact on marketers, including: a greater emphasis on modern media measurement; continued growth of converged TV and video streaming; and multiscreen TV driving business results. These trends are setting the stage for a 2022 (and beyond) that marketers can take advantage of.

In our analysis, the VAB has found that brands will be better equipped for success in their marketing plans by understanding these key points:

- Video streaming is universal among all "cord" groups. The shift in viewer behavior to streaming means that marketers can engage with passionate and attentive audiences within premium OTT environments to inspire consumer action.
- Leverage the popularity of advertising-based video on demand (AVOD) to resonate with all audiences. With a consumer preference towards free, ad-supported streaming, marketers can leverage the rising popularity of premium AVOD to ensure their multiscreen video campaigns resonate across all audiences.
- Streaming campaigns drive business success. Marketers are achieving greater results across KPIs due to the increasing scale and engagement of video streaming as the incremental reach opportunity grows across all groups, especially non-corded people.

Connect with the cordless

As the streaming landscape advances, brands that follow these practices will increase their ability to drive KPIs including incremental campaign reach and increased ad recall, brand favorability, consideration, website visits, in-store traffic and sales. By making smart investments and strategic decisions, today's marketers are well-positioned to successfully connect with the cordless and drive business success in both the short term and long term as streaming continues evolving.

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••• ad research

Trust me on this

How privacy can be a competitive advantage in digital marketing

| By Dawn Paul

snapshot

Dawn Paul outlines the value of a respectful and methodical approach to gathering first-party data.

The data privacy movement is disrupting digital marketing worldwide. But disruption leads to innovation. With the right tactics, privacy is an opportunity for competitive advantage.

Throughout the history of digital advertising, there have been many important changes that caused concern for how brands do business. In the end, marketers have learned to adapt to this fluid environment and in most cases have ended up better off than before. Data privacy is proving to be no different. While being driven by consumer apprehension on how personal information is being collected, stored and used, it's causing marketers to rethink how they can be smarter in their approach and improve users' online experience to encourage long-term relationships.

Some players in big tech have acknowledged their responsibility for digital privacy and already implemented changes. Google's plan to phase out the third-party cookie, now projected for the end of 2023, is one huge step. Apple also recently implemented an opt-in system for data collection on the App Store, putting the decision-making power back into consumers' hands and forcing more transparency from the apps themselves.

The way marketers strategize is changing but what many don't realize is this actually could be good for business.

The benefits of sharing

Despite wariness on personal information being used for online marketing purposes, consumers are recognizing the benefits of sharing some information with businesses they value and trust. In Adtaxi's 2021 priva-

cy study, 44% of U.S. respondents said their online experience is better because apps and websites collect their data and 45% said they generally give permission to collect their personal information when asked. Preferences are clearly moving toward informed choice and control, rather than a blanket ban on all data collection.

This is where the privacy movement becomes an opportunity. First-party data – the customer information that you collect yourself – is an incredibly valuable resource when used correctly. If marketers can tap into consumer preferences around consent and personalization, they can build a new and highly effective approach that centers around trust and ethical data practices.

Collecting high-quality first-party data is no small task; it's a concerted effort where customer experience should be front and center. The goal is to genuinely earn customers' trust and help them understand how sharing data can benefit them by unlocking a better and more personalized experience. It is important to use clear, transparent language and underscore that customers are empowered to make their own choices.

Ask for information gradually, rather than overwhelming customers with questions. Name, contact information and purchase history – which many online shoppers are used to sharing – are excellent starting points to build from. Over time, you can begin to look at how they interact with your site and brand, whether through browsing data, reviews or creating an account with additional personal details and preferences.

A great way to help website visitors share data is to incentivize them. By offering discounts, loyalty programs, exclusive access and more in exchange for data, you can show customers that sharing information makes their experience better and that you value their unique perspectives.

Accuracy and effectiveness

Using first-party data is where attention to privacy really becomes a competitive advantage. With a respectful and methodical approach to data collection, and a strong strategy for implementation, brands can target new and existing customers with serious accuracy and effectiveness.

Building a segmented database is the first crucial step, fundamental to effective personalization and targeting. Dig through the data you already have and don't shy away from the details. Even if a category of information does not seem immediately relevant, having it organized could be a crucial asset down the line. Start with basic demographics – location, age, etc. – and then move to details like buying patterns, interests and more. You may be surprised at what you learn just by looking at each category one by one.

The more details you have, the more effectively you can reach your target audiences both on your platforms and across channels. Customizing messages and creative to different targeted groups is the gold standard for digital marketing – a much better use of ad-spend than pushing out all of your content to all of your contacts.

Retargeting works the same way. Using the data you have to provide customers with highly personalized suggestions and messages creates an ideal environment for conversion. And because website visitors have consented to share their data and understand the value exchange, seeing the personalization in real time will help further strengthen the relationship.

Because you own the data you collect, you can rely on a higher level of accuracy, both in targeting and in your metrics, to give a more accurate picture of your customers' behaviors and interests. With a fuller picture of how customers interact with your brand, you can make more effective optimizations and build more intentional campaign strategies. As the relationship evolves, you can even leverage user patterns and personas to inform how you go to market and how you develop future products.

The art of adaptation

Relying less on the third-party cookie economy doesn't mean ad-tracking goes entirely out the window. Campaigns can still secure user data through APIs like Google Chrome's Privacy Sandbox, mobile ad IDs (which tend to be ultra-reliable, as most people shop on their own mobile devices) or make certain content available in exchange for first-party data.

Normalizing first-party data-based campaigns poses a major opportunity for advertisers, since brand-owned data can still inform all the previously-available targeting levers and platform-specific campaign tools you've likely become familiar with (lookalike audiences, e-mail lists, cart-abandonment and other dynamic retargeting options, to name a few).

Here are some other common approaches advertisers are utilizing to adapt to recent privacy measures limiting the use of third-party data:

- Leverage native advertising to expand your audience on social media feeds. Native ads are an opportunity to directly control the brand message and user experience and are demonstrably more readable and shareable on social media compared to display ads. Native strategies work best when they're informative while matching the look and feel of their surrounding platform – 70% of consumers say they prefer learning about products or services through content rather than traditional advertising.
- Create ad groups targeting "only trackable users" on the Trade Desk platform to cater to your customers' journey across devices and channels where your ads will have the most impact. Cross-device targeting will reveal valuable insights into how your audience acts and which behaviors, devices and experiences lead to the most conversions.
- Implement device ID-based targeting strategies away from mobile Safari by serving ads across in-app environments. In-app advertising provides precise first-party data gathered from the app's policy agreement usually required in order to download. Matching mobile device IDs to users allows your brand to reliably target by geolocation and other personalized options.
- Develop quality content in line with the ideal specifications for each marketing channel, including video ads where appropriate (which is most places). Video content in 2020 saw 10x more Twitter engagement than tweets with only text, increased the shareability of LinkedIn content by 20x, generated the most engagement of any content type on Instagram and made Pinterest users 2.6x more likely to make a purchase.

Refine your strategies

Your organization should take time to make process changes permanent with the fading of third-party cookies. Now, this doesn't mean your marketing plan needs to forgo digital advertising. But it does mean that you need to refine your strategies and consider different concepts. Implementing required ongoing testing may greatly increase your ability to pinpoint what works best, driving results and helping you maintain current customers while connecting to new ones.

Assessing effectiveness may also look different as the industry moves forward. More factors may need to be considered when evaluating success across platforms. Regardless of where you are in the process, privacy will remain a priority for both brands and consumers. It is extremely critical that advertisers and agencies factor this into their digital marketing plans. While shifts in the industry are inevitable, the privacy push is and will continue impacting businesses of all shapes and sizes.

Your best defense for the changing landscape is to always be agile and proactive. No matter what happens next, privacy will continue to be a focus moving forward, and in order to remain competitive, as a brand, you need to be prepared.

Build something stronger

Privacy may be changing digital marketing as we know it, but the benefits of first-party data – more accuracy, better targeting, better metrics and better customer relationships – should not be underestimated. In fact, with first-party data you can build something even stronger.

The more fully you commit to privacy, the greater the rewards. When a customer opts-in to sharing their data, they are creating a bond of trust that will benefit both of you for the long term. Maintaining and strengthening this trust is an investment in a stronger and more sustainable future.

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••• the business of research

Not a one-time thing

Thoughts on making research an ongoing effort in your company

| By Dave Carruthers

snapshot

Podcast guests help Dave Carruthers explore how to weave insights-gathering into an organization's fabric.

Over the last few years, even before the pandemic, companies across a range of industries have been in a fairly aggressive mode of transformation to react quickly to changing consumer trends and behaviors. Sometimes the reactions are short-term, in response to something in the market. Other times they are more lasting, reflecting the seismic impact of a broad cultural shift.

No matter the cause or the time frame, it is crucial for brands to understand what's going on, why it's going on and how it can affect them. More importantly, understanding the shifts in behaviors certainly helps companies understand the person behind the consumer.

As Megan Kehr, analytics insights associate manager at PepsiCo, mentioned on our podcast, "Reel Talk: The Customer Insights Show," insights professionals have increasingly spoken about gaining a deeper sense of consumers' lives. "For example, take somebody like me and not just seeing me as a Pepsi drinker … while my consumption behavior is part of who I am, I'm also a wife, a sister, a daughter, I'm a cat mom. There are all these other aspects of my life outside of the beverage I drink that make up who I am," she said.

To truly understand our consumers, we certainly can't just check in with them every few years; we have to build that ongoing relationship. And one way to do that is by making research an ongoing effort that spans company culture.

But how can we accomplish that? Let's dive in.

The why

Market research can have the most impact on companies when it provides insights that can be acted upon and that offer something executives and stakeholders didn't know before.

Many have used Henry Ford's famous quote – "If I had asked people what they wanted, they would have said faster horses." – in arguing

against talking to consumers. People don't know what they want, the thinking goes, so why ask them? But what if that's the wrong argument?

"They would say 'horses' because they didn't know cars existed," said Nick Graham, global head of insights and analytics at Mondelez, on a "Reel Talk" episode. "But they could tell you they wanted to go faster. They could tell you some of the things they were comfortable with or not comfortable with. And you could have built the idea of a car from that."

With so many choices for consumers today, asking them relevant questions, listening and genuinely understanding them on a consistent basis becomes essential.

There are three main ways to integrate ongoing research into a company: always on; part of the process; and project-based.

Always on. When feedback mechanisms are always on, research is built directly into the customer experience. For example, think of the emoji buttons people can push after walking through airport security. (Would you give your experience a smiley face or a frowny face?) Easy-breezy. Or when customers call a company and there's a survey at the end of the call. Or when purchasers can leave an immediate video response after buying a new product.

But don't overdo it, said customer experience keynote speaker James Dodkins on "Reel Talk." "Don't try to get feedback at every little interaction along the way. I understand the logic behind it. I understand that they want that data to look at it and see where they can improve. But all you are doing is making the overall experience worse for the customer because you are badgering them every second," he said.

Part of the process. Indeed, not all research initiatives can be added to the ongoing process, but some can. For example, let's say a company is looking at the future of communications in car travel (to stick with the automobile theme a bit here) – that's something that's more likely to fall into the project-based category.

But a team that creates digital ads, TV programming and provides other ongoing customer experiences can certainly make feedback loops for the customer easy.

Of course, you can also use social listening as part of that process. Many consumers share opinions on social media about the shows they just watched or a snack they just consumed. You can gather that information and mine it for insights.

But also consider the downfalls of analyzing big data. "What can big data deliver as opposed to going out and eyeballing your customer?" asked Graham Kenny of Australia-based Strategic Factors on an episode of "Reel Talk." "I think there's a difference in what both can deliver. But relying on big data as the only way to do it is going to be a disaster."

Added Jenn Vogel, Voxpopme vice president of marketing and "Reel Talk" host: "A mountain of data isn't useful on its own. It's useful when you can summarize some new insight into one sentence to say, 'This is what this means to our business, our customer.' That's where the insights team can shine."

Project-based. Sometimes, a project-based approach is the clearest option. That includes when we want to find out something very specific or have a request from a stakeholder to test a new idea that doesn't fit into the day-to-day product or ad-testing process.

But good research often leads to more research: What is the next set of questions that needs to be addressed based on what we just learned? From there, companies can start making product and marketing decisions. I see this concept come to life just about every week when we publish results from a consumer study on our blog. For example, one study looked at whether consumers prefer to exercise at home or at the gym. We found that over 50 percent of respondents prefer the home workout.

The research allowed us to learn some of the overarching preferences of the different groups. Once we understood that, we could break it down and dive into the consumer group that exercises at home further: Why aren't they using equipment while working out at home? How do they choose what to do? Are they feeling good about their workouts?

Increases in efficiency

Many researchers are now asked to do more with less. That can be stressful and once we recognize the stress and decide to make the process better, implementing ongoing research can help. And as you gain more experience, you should see increases in efficiency (once a process is in place and gets used it can become more efficient), effectiveness (making the process simpler and less cumbersome), reliability, volume and timing.

That last point is key. "Market research needs to accelerate timelines and get user feedback to stakeholders in a much more user-friendly way than is done today," said Rick Kelly, chief product officer at Fuel Cycle, on a "Reel Talk" episode. "If I need feedback from customers, I can't wait four to six weeks for a survey or a focus group to get done. I need to know something right away so we can prioritize it in the development process."

See the value

Life is about relationships and that includes our relationships with stakeholders and leaders. That means pulling in the right people at the right time and making sure they see the value in the relationship. They should recognize the problem you can help them solve and also that their thoughts are appreciated.

"Here's one piece of the puzzle and I know that my colleague here has another piece of the puzzle and our other colleague has the third piece of the puzzle," said Brenna Ivey, associate director of strategy and insights at Policygenius, during a "Reel Talk" conversation. "Let's work with them together to see what the answer is. That, I think, is the best way to get credibility."

Understand stakeholders

Of course, to get buy-in we have to understand our stakeholders and that includes their personalities, goals and even limitations of their roles.

Further, every brand has guardrails of what is possible and what won't be pursued. If you know you won't do specific things with your products, why ask about those things? If you will never use pink packaging, why even bring it up?

And, make sure the questions you do ask can actually lead to insights that you or your stakeholders have the authority to act on. Don't ask about packaging if you aren't working with the team responsible for the packaging, for example.

Establishing the right workflows

Some of us have probably been on teams where workflows were just not efficient enough or didn't work for ongoing participation.

Sometimes, it's the mind-set or culture. For example, Joanna Lepore, now strategic foresight lead at Mars Wrigley, said on "Reel Talk" that she had been in situations before where certain teams didn't collaborate. "The insights team was like, 'You are not allowed to do that. Go back into marketing,'" she said, adding that the right workflow also creates an avenue for meaningful collaboration.

Melina Palmer, host of "The Brainy Business" podcast, likened process implementation to driving a car: When you learn how to drive a car, there's a lot to think about. There's also a lot the new driver doesn't know, yet. But that process gets easier over time and even automatic to an extent.

"The last time you drove your car it was probably really easy and you didn't have to think about it at all," she said on "Reel Talk." "That's because it has moved into that subconscious processing space. It doesn't need to clog up your conscious processing because your brain knows to check your mirrors and how to press the gas."

The same holds true for an integrated market research process. We have to make it part of the automatic process. Have a product idea or eureka moment about packaging? Run a quick market research check to see what insights can be gathered before going too far down the rabbit hole.

On a final note about ongoing market research, I want to stress the importance of accessibility and inclusivity. That includes making sure you ask the right demographic questions and ensuring people with disabilities can participate.

So beneficial

The right research processes, integrations and ongoing efforts can be so beneficial to companies. Market research needs to go beyond being a box that gets checked. It should be a box that gets checked because it can help companies understand their consumers and make products and services better and more valuable for them.

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••• ad research

Hitting the peak of pique

The rhythms of attention and memory in advertising

| By Charles Young

snapshot

Charles Young outlines how an ad's emotional highs and lows impact its effectiveness.

Attention and memory are the alpha and the omega of advertising effectiveness, just as rhythm and melody are essential for anyone trying to pen a memorable pop song. To connect attention-getting advertising to action, such as consumer purchasing behavior, it is necessary for advertising to work through memory.

Short-term or working memory, which integrates all the perceptions of the advertising experience streaming to the brain – pictures, words and music – does its job typically in less than 30 seconds, before passing the ball to long-term memory.

For advertisers who debate the short-term versus long-term effects of advertising, it is important to understand that memory plays a role in all types of effective communication. Performance advertising, focused on short-term sales effects, works by activating existing memories left behind by past marketing activities, while brand-building advertising does its job by adding new memories to the brand's memory bank account, which then can pay dividends over months or years.

In the current "attention economy," therefore, it is important to understand how attention is connected to memory in a piece of communication.

To study long-term brand memories, Ameritest ran a follow-up experiment with 36 fast-food commercials that we had tested a year earlier. In this experiment we used two very different approaches to our diagnostic measurement: the Picture Sorts technique used in our standard pretest, and EEG measurement, using brain wave equipment developed by Steve Sands of the University of El Paso.

What we discovered is that the two measurement approaches are uncorrelated but complementary in providing insights into the communication problem. That is, the two measurement approaches are measuring two different psychological variables that are both involved in determining advertising effectiveness.

Both approaches did agree that commercials that do an above average job of breaking though media clutter to attract viewer attention are characterized by a greater number of peak moments of experience. But as we will see, a "peak moment" means something different with each measurement approach.

For the 20 high-attention ads in our test sample, brain waves peaked an average of 3.7 times versus only 2.3 times for the 16 low-attention ads. Similarly, when we looked at the picture-sort data for the Flow of Attention we found 4.6 peaks for high-attention ads versus 3.4 peaks for low-attention ads. So, not surprisingly, we concluded from both approaches that the rate at which a TV commercial produces memorable moments of experience is predictive of engagement overall.

What was interesting was that when we compared the two sets of time-series data, ad by ad, we discovered that brain waves and picture sorts of memory don't often peak on the same moments.

Altogether, the 36 commercials generated 113 brain wave peaks and 149 picture-sort peaks but only 61 peaks were common to both measurement systems.

Double peaks, or moments that are peaks in both the brain wave and picture-sort data, are by far the most strongly predictive of the overall attention score for an ad. They occur four times as often in high-attention ads as in low-attention ones.

Hardest-working parts

The convergence of the two measurement systems, therefore, can help advertisers identify the hardest-working parts of an ad. Content analysis revealed that double peaks were most likely to contain the following:

- relevant news, such as the announcement of a price promotion;
- inciting incidents, typically involving a moment strongly charged with negative emotion to set up a joke or storyline;
- surprising moments or turning points in stories;
- climactic moments or punchlines for jokes.

In other words, double peaks can be used to identify the most dramatic highlights of an ad from an audience's point of view. If we were talking about movies instead of TV commercials, these would be the scenes that would most likely make it into the movie trailer.

What about the peak moments that one diagnostic technique identifies but the other does not? One part of the answer is quite simple. With brain waves, we are measuring audience response to the total multi-sensory experience – the pictures plus the words plus the music – while the picture sorts focus only on the visual part of the commercial. (We use a similar technique called Copy Sorts to probe the verbal communication.) So, in some instances brain waves peak at a moment in an ad identified with a strong line of copy but not necessarily a strong visual.

In short, while brain waves measure the total multi-sensory experience in real time as a video is being watched, picture- and copy-sorting memory-recognition-based techniques can be used after the fact to peel back the different layers of the advertising experience.

Activate the senses

However, this is not the whole story. When we analyzed the content of the peak experiences in these ads, it turned out that there were nearly the same number of peaks for the "story" part of the ad, while the picture sort that measures selective attention – the Flow of Attention – produced more than twice as many peaks as the EEG measurement did in the "product" part of the ad, particularly product images that would activate our basic senses such as taste, touch and smell.

Our hypothesis for this finding is that these images tap into the deepest part of the brain – the "reptilian" brain or amygdala – which is where our primitive drives such as hunger or sex originate. Because these parts are deep in the center of the brain, they're harder to read with EEG machines that only pick up electrical activity closer to the surface of the brain.

But the most intriguing finding in this experiment was one that may help explain the rhythmic structure of visual communication with motion pictures.

As we analyzed these ads scene by scene, we observed that the brain wave pattern would sometimes peak at the beginning of a scene, where it was unclear what was about to happen. This would correspond to a low spot in the Flow of Attention. Then the brain wave arousal would fade at the end of a scene, just as the Flow of Attention was peaking. As a result, in some storytelling parts of the ad, the brain wave curve and the memory curve would be moving in opposite directions.

This makes sense if we consider the difference between these two measurement techniques. Brain wave EEG machines measure the amount of energy being produced by the brain moment by moment in real time, as a viewer watches a video.

But unlike brain-wave measures, picture-sort data is collected after the fact, typically several minutes after the forced viewing of the ad in a test. By this time the images from an ad have already been sorted by the brain and encoded into memory.

The first of the three picture sorts that we use in a pretest, the Flow of Attention, is a measure of the selective attention of an audience that is, in fact, the most predictive diagnostic for the attention score for a digital or TV ad. The second and third picture sorts – the Flow of Emotion and the Flow of Meaning – are, on the other hand, the most predictive diagnostics for the motivation score of an ad – the link to action or future purchasing behavior.

Memory researchers have established that what the brain remembers is its interpretation of the meaning of what just happened in an experience. And the emotional response generated by an experience is a key predictor of long-term memory formation.

Figure 1

Peak Moments From a Wendy's Commercial
(Out of 26 frames)

Brain Waves and Picture Sorts® Identify a hierarchy of memorable moments in a commercial.

With that in mind, we now have a new insight into how long-term brand memories may be formed. This is how the perceptual process works from a storytelling perspective: stories begin with moments or scenes that arouse our curiosity. In response, the brain releases energy to alert the mind to new information – "Pay attention here! Something new is about to happen!"

As a result, brain waves peak as neurons fire away. But as a scene unfolds into something emotionally meaningful, only the important information is sorted into memory. With that resolution, the brain returns to a state of rest and neuronal activity quiets down.

In the context of advertising, it would be these emotionally meaningful visuals that comprise the set of images encoded into long-term memory that we would expect to be most strongly associated with the brand image.

Of course, brain waves may also peak on the resolution of a scene. Because a film or video is designed to be a chain of meaningful moments, the resolution of one scene may be the beginning of another as audience engagement is ratcheted up with the build in involvement from the beginning to the end of the story.

But in general, this back and forth between curiosity and meaningful resolution is what helps to give rise to the rhythms of visual storytelling.

Memory hierarchy

One of the other things that academic researchers have learned about memory is that there is a hierarchy to how our memories are stored. Not all of our memories are created equal. Our brains don't store all the information about an experience but only the essential parts – the gist of it, just enough so that we can reconstruct the original experience when we remember it.

An easy way to think about this is to use the analogy of the long-running game show Wheel of Fortune. In the game contestants try to figure out a word or phrase by a few letters – thus eliminating redundancy. If you're lucky enough to guess a few essential letters right off, you can quickly guess the whole word. But if you pick the wrong letters at first, it takes longer to guess the word.

One trick to understanding how a brand-building commercial or web video might be stored in consumer memory is to identify a minimal set of images that could be used to describe a whole ad – as in the original storyboard.

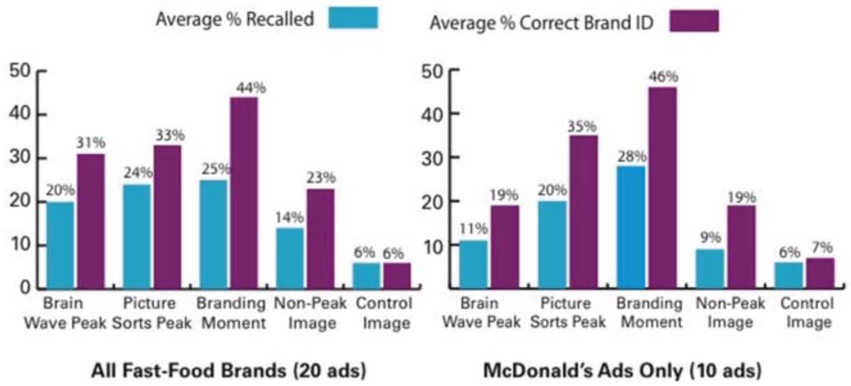
Figure 1 shows how data can be used to identify the minimal image set from a high-performing Wendy's ad that we tested.

Altogether we needed 26 perceptually distinct images to describe the total visual information content of this 30-second commercial. But by

Figure 2

Long-Term Brand Imagery

Both Brain Waves and Picture Sorts Peaks are correlated wtih long-term brand associations but the best predictor of long-term brand memories are the Branding Moments.



using brain wave peaks, this set can be reduced to the seven images shown in the first row.

The commercial is about a man telling his girlfriend that he was late coming home because he and a friend saw a unicorn on the street. The girlfriend was not moved by this tall tale but was surprised by an offhand remark he makes about a 99-cent chicken sandwich on sale at Wendy's.

If we look at the seven peak frames in the next row, identified by the Flow of Attention, we get a slight variation on the story. Now we learn that the man was actually eating the chicken sandwich when he saw the unicorn. But two other images are gone – shots that provide the setup for the central unicorn visuals – and instead we see an additional image of a tasty chicken sandwich to add appetite appeal to the rational 99-cent price message.

Finally, we can identify an even smaller set of four images that score high on both the Flow of Attention and the Flow of Emotion combined – what we call the brand-building moments of the ad.

These are, by definition, images that consumers 1) focused their attention on and 2) that are highly charged with self-reported emotion. According to these four visuals, the gist of this effective creative idea is that the offer of 99 cents for these chicken sandwiches at Wendy's is as rare as a unicorn.

Any of these small sets of images might be enough to win an advertising version of Wheel of Fortune. But which comes closest to describing how these images might actually be stored in the hierarchy of long-term memory? To answer this question, in our follow-up experiment to our original ad tests we interviewed 200 consumers about a year after all the ads had aired in-market. We showed consumers a large number of images taken from the commercials, in randomized order. After showing each image we asked two questions: did they remember ever seeing it on TV and which brand was it for.

The results are shown in Figure 2. The chart demonstrates two things. First, the set of images that had, by far, the most memorable performance over the long term were those that captured both high attention and generated a high (self-reported) emotion – the small subset of images in an ad that work the hardest to build a brand.

Second, advertising images are indeed stored in memory in a hierarchy – not all the images from a given ad are remembered equally well. Some images in an ad are more memorable than others.

Finally, by using the complementary diagnostics of brain wave measurement and picture-sorting memory probes in the same experiment, we've gained a new insight into how advertising works. The rhythmic structure of visual storytelling is important for understanding the how that hierarchy is constructed.

Rhythm is key

Watching ads and listening to a piece of music have a lot more in common perceptually than we realize. Rhythm is key to both forms of communication – and key to building a vibrant brand. By paying attention to the emotional highs and lows of an ad, and charting their impact on the viewer's experience, you can understand how to tell your brand's story in the most effective – and memorable – way possible.

Charles Young is CEO of Ameritest. He can be reached at chuck@ameritest.net.

••• special advertising section

10 TOP CONCEPT RESEARCH AND TESTING COMPANIES

Who better to judge a new product concept than the audience that's going to use it? When it comes to introducing new products to the market, rigorous concept testing beforehand can mitigate risk of marketplace failure. Companies that specialize in concept testing and research are experienced in finding the right respondents and utilizing the most effective methodologies to provide insight into product development.

These companies offer expertise across sectors from B2B and health care to consumer and media. Whether your research requires recruitment services, package testing or survey programming, these specialized research companies are here to help.

Decision Analyst

Founded 1978 | 150 employees
Jerry Thomas, President and CEO
Felicia Rogers, EVP

Decision Analyst is a recognized leader in new products concept testing and forecasting. Its professionals have evaluated thousands of new product concepts for durable goods, nondurable goods and services. Decision Analyst offers an array of concept testing services for each stage of the development process. ConceptScreen® is a proprietary system that allows you to screen and evaluate sets, or batches, of early-stage new product concepts. ConceptCheck® is an online system to provide diagnostic feedback for individual early-stage product concepts. ConceptTest® is an industry-leading online concept testing system that can improve a company's chances

of success in developing and introducing new products. Conceptor® volumetric forecasting is a series of models to predict new product success and forecast actual retail depletions during a new product's first year on the market.

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www.decisionanalyst.com/services/concept

Fieldwork

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Steve Raebel, President

Our specialties include B2B, consumer and global research. For over 40 years Fieldwork has recruited the highest-quality business, medical and consumer respondents both through and far beyond databases, using proven methods to reach your audience. We believe in a customized approach to recruitment. Fieldwork provides unsurpassed project management, hosting and complete guidance through in-person, remote/online and hybrid research sessions. Our technically versed support staff will confidently guide you through the logistics from large online to multicountry project execution. Fieldwork is your qualitative research partner. Focus on the research. We'll do the rest.

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www.fieldwork.com/market-research-services

Fuel Cycle

Founded 2009 | 120+ employees
Eran Gilad, CEO

Fuel Cycle's award-winning Market Research Cloud is the most comprehensive intelligence-gathering ecosystem that exists today. Our platform enables decision makers to maintain constant connections with their customers, prospects and users to uncover real-world actionable intelligence. By integrating human insight with critical business data and through automated quantitative and qualitative research solutions, Fuel Cycle's Market Research Cloud powers product innovation, brand intelligence and enhanced user experience. Breakthroughs require action. We built Fuel Cycle to ignite it.

Phone 1-323-556-5400
www.fuelcycle.com

InsightsNow

Founded in 2003 | 35+ employees
Dr. David Lundahl, CEO and Founder

InsightsNow is a full-service, award-winning behavioral research firm that partners with companies across a wide array of industry verticals to accelerate business decisions. We specialize in supporting companies' creation of disruptive innovations for achieving a cleaner, healthier, happier world. Using proprietary and unique behavioral research approaches, we work with clients to discover creative, collaborative and innovative insights. The team has a passion for uncovering people's beliefs, behaviors, triggers, cues and motivations to help identify unexpected human truths that inform and inspire. Through implicit testing applications such as our Implicit/Explicit Test™, custom research solutions or assisted DIY tools, we help find answers faster – improving speed-to and success-in market. By partnering with InsightsNow, clients can delve into the "why" behind human behavior and design research to address challenges and accelerate innovation by focusing on consumer behaviors and emotional drivers. Visit our website to learn more.

Phone 1-541-757-1404
www.insightsnow.com

Kadence International

Founded in 1991 | 300 employees
Ellie Tehrani, CEO – Americas

Kadence International is a global boutique market research agency. With offices spanning Asia, Europe and the Americas, we combine the global reach of a large agency with the agility and personalized service of a small boutique. Our goal is to be more than just a service provider. We passionately believe great research is core to all business success. With every interaction, Kadence becomes an extension of your team, helping your brand make strategically sound and profitable decisions. Kadence International offers a broad spectrum of research services including participant recruitment, segmentation, new market entry, usage and attitude surveys, product and package testing, concept testing and validation, and much more. We have expertise in a variety of verticals including health care, technology, consumer goods, food and beverage, B2B, automotive, agriculture, media, e-commerce and telecommunications.

Phone 1-650-350-2966
Kadence.com

Mindspot Research

Founded 2006 | 8 employees
Jeanne Campbell, Managing Director

Mindspot is a full-service custom online research consultancy. Online surveys are a core competency and the team at Mindspot Research design them every day on their proprietary survey platform. Their advertising testing evaluates each campaign spot, commercial, print or digital asset and the message being communicated. With two decades of experience, they can help qualitatively gain feedback to design and refine campaigns. Their research technologies have advanced security features including digital watermarking and no right click downloads. Their services and seamless process offers pretesting ad concepts among members of your target market, reducing risk, increasing in-market success for campaigns and providing the greatest return on your marketing investment.

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www.mindspotresearch.com

Murray Hill National

Founded 2013 | 35 employees
Susan Owens, COO

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Quest Mindshare

Founded 2003 | 126 employees
Greg Matheson, Managing Partner
Joe Farrell, Managing Partner

Launched in 2003 to meet the needs of technology companies, Quest began survey operations to 45,000 persons employed in technical fields. With fast-growing panels and a focus on utilizing the greatest survey security technology, Quest Mindshare is now well-known to provide the most extensive and flexible groups of online panel assets for every B2B and consumer need. Quest's largest panels reside in North America and Europe but the agile project management team can superbly tackle projects anywhere in the world. Let Quest know what your hard-to-find audience is (from ITDMs, financial DMs and web developers to moms with babies, music ratings and everything in between) and the team of market research experts and professionals will either offer support through diverse panel assets or recommend ways to achieve your target.

E-mail sales@questmindshare.com
Phone 1-416-860-0404

sightx

SightX

Founded 2015 | 27 employees
Tim Lawton, Co-Founder
Naira Musallam, Co-Founder

SightX is an automated end-to-end consumer insights platform that enables you to drive more efficient data-driven decision-making. The intuitive interface and automated analysis capabilities make it simple to dynamically test product or ad concepts, get results within hours and have all of your analysis and reporting in one solution. By providing users with the most robust yet flexible platform in the world, SightX enables you to impact your brand with just the click of a button. Find out how consumer insights, marketing and CX teams at leading organizations use SightX to transform the way they work.

sightx.io/capabilities/concepttesting

CALENDAR OF EVENTS

••• can't-miss activities

Informa Connect will hold InsighTALENT vs. InsighTECH on **March 1-2** as a virtual event. Visit informaconnect.com/consumer-insights.

Merlien Institute will hold its Qual360 North America 2022 on **March 8-9** at Gallup HQ in **Washington, D.C.** Visit bit.ly/3IwYv6N.

Quirk's Media will host Webinar Wednesday on **March 23**. Visit www.quirks.com/events/webinar-wednesday-march-23-2022.

Intellus Worldwide will hold its 2022 Summit as a virtual event on **March 24** and **March 31**. Visit www.intellus.org/Events-Webinars/Summit-2022.

The Insights Association will hold the IA Annual Conference on **April 4-6** in **Philadelphia**. Visit www.insightsassociation.org/network-learn/conferences.

Merlien Institute will hold its Qual360 Europe 2022 on **April 5-6** in **Berlin**. Visit bit.ly/3dzKdEe.

The 2022 Quirk's Event – Chicago will be held on **April 11-12**, at the Sheraton Grand in **Chicago**. Visit www.thequirksevent.com.

Sawtooth Software will hold its 2022 conference on **May 2-6** in **Orlando, Fla.** Visit events.sawtoothsoftware.com/orlando-2022/overview.

The 2022 Quirk's Event – London will be held on **May 4-5**, at the InterContinental London O2 in **London**. Visit www.thequirksevent.com.

Merlien Institute will hold its CIEX Data Insights Summit 2022 on **May 10** as a virtual summit. Visit bit.ly/3dyqCEA.

The QRCA will hold the in-person wing of its 2022 Annual Conference on **May 16-18**, in **San Diego**. Visit www.qrca.org/page/annual-conference.

Merlien Institute will hold its CIEX Data Insights Summit 2022 on **May 10** as a virtual summit. Visit bit.ly/3dyqCEA.

The Strategy Institute will hold its Future of Pharma Marketing Summit 2022 on **May 18-19** in **Toronto**. Visit www.digitalpharmasummit.ca.

Quirk's Media will host Webinar Wednesday on **May 18**. Visit www.quirks.com/events/webinar-wednesday-may-18-2022.

Informa will hold The Media Insights and Engagement Conference on **May 23-25** at the Grand Hyatt in **Nashville**. Visit informaconnect.com/media-insights.

The Insights Associaton will hold the X Event on **June 6-7** at a location to be announced. Visit www.insightsassociation.org/network-learn/conferences.

The Strategy Institute will hold its Digital Marketing for Financial Services Canada Summit 2022 on **June 8-9** in **Toronto**. Visit www.financialdigitalmarketing.com.

Quirk's Media will host Webinar Wednesday on **June 15**. Visit www.quirks.com/events/webinar-wednesday-june-15-2022.

Merlien Institute will hold MRMW North America 2022 on **June 15-16** in **Atlanta**. Visit na.mrmw.net.

Merlien Institute will hold MRMW APAC 2022 on **July 6-7** in **Singapore**. Visit apac.mrmw.net.

AURA will host its awards ceremony on **July 14** in **London**. Visit www.aura.org.uk/pages/the-auras.

The 2022 Quirk's Event – New York will be held on **July 20-21** at the Javits Center in **New York**. Visit www.thequirksevent.com.

Quirk's Media will host Wisdom Wednesday on **August 3**. Visit www.quirks.com/events/wisdom-wednesday-webinars-august-3-20222022.

The Insights Association will hold its IDEA Forum on **August 9-10** as a virtual event. Visit www.insightsassociation.org/network-learn/conferences.

ESOMAR will hold its Congress on **September 18-21** in **Toronto**. Visit esomar.org/initiatives/congress-2022.

Merlien Institute will hold MRMW Europe 2022 on **September 20-21** in **Berlin**. Visit eu.mrmw.net.

Quirk's Media will host Wisdom Wednesday on **September 21**. Visit www.quirks.com/events/wisdom-wednesday-webinars-september-21-20222022.

The 2022 Quirk's Event – Virtual will be held on **October 12-13** online. Visit www.thequirksevent.com.

Informa Connect will hold FEI on **October 19-21** at the Encore Boston Harbor in **Boston**. Visit informaconnect.com/feiusa.

Quirk's Media will host Wisdom Wednesday on **October 26**. Visit www.quirks.com/events/wisdom-wednesday-webinars-october-26-20222022.

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

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10 minutes with...

Maia Chang and Ali Beck
Managers, Consumer Insights
Ferrara

Editor's note: Ferrara's insights team was awarded the 2021 Best Client-Side Team award and was recognized at the Marketing Research and Insight Excellence Awards Virtual Celebration. To learn more about the awards, visit quirksawards.com.

What is your favorite brand to work with and why?

Ali Beck: We can't pick favorites! Though, Black Forest is a very interesting brand to work with because it spans both candy and fruit snacks categories. Understanding both categories, and the intersection of the two, has been a priority for us. It is very exciting to build out these foundational learnings. And, working to bring to life innovation for the Black Forest better-for-you candy consumer has been super interesting and insightful.

The Ferrara insights team partners with local universities to provide students with hands-on consumer research experience. How do these partnerships influence your work as researchers?

Maia Chang: Ferrara has partnered with local business schools for the past few years to work with students on both quantitative and qualitative research. These partnerships have been fantastic in allowing us to work with brilliant minds – both students and professors! Because many of these students have never worked with insights they're able to come in with a fresh perspective and ask creative questions. It's always inspiring to hear their excitement as they uncover unexpected insights.

Will you be leveraging any new methodologies or tools in the next year?

Chang: We're always looking for methodologies and tools that will help deliver strong consumer insights! Like everyone else in the industry, we're always faced with the challenge to deliver insights quicker. We're also continuing to run into COVID-driven research challenges – e.g., more challenging to do in-person research – and recognize that consumer behavior continues to change quickly because of COVID-19, so being creative and open to new methodologies is critical to delivering insights to help our partners.

Beck: Definitely! We're always looking at new approaches to ensure we're adapting to what is best-in-class in the industry and of course conducting our research most efficiently. There are many new solutions that offer quick, turn-key product research. Given the internal need for faster insights we are always evaluating these solutions with a close eye on research quality to ensure that we're compromising where we can but not making any sacrifices to our data quality.

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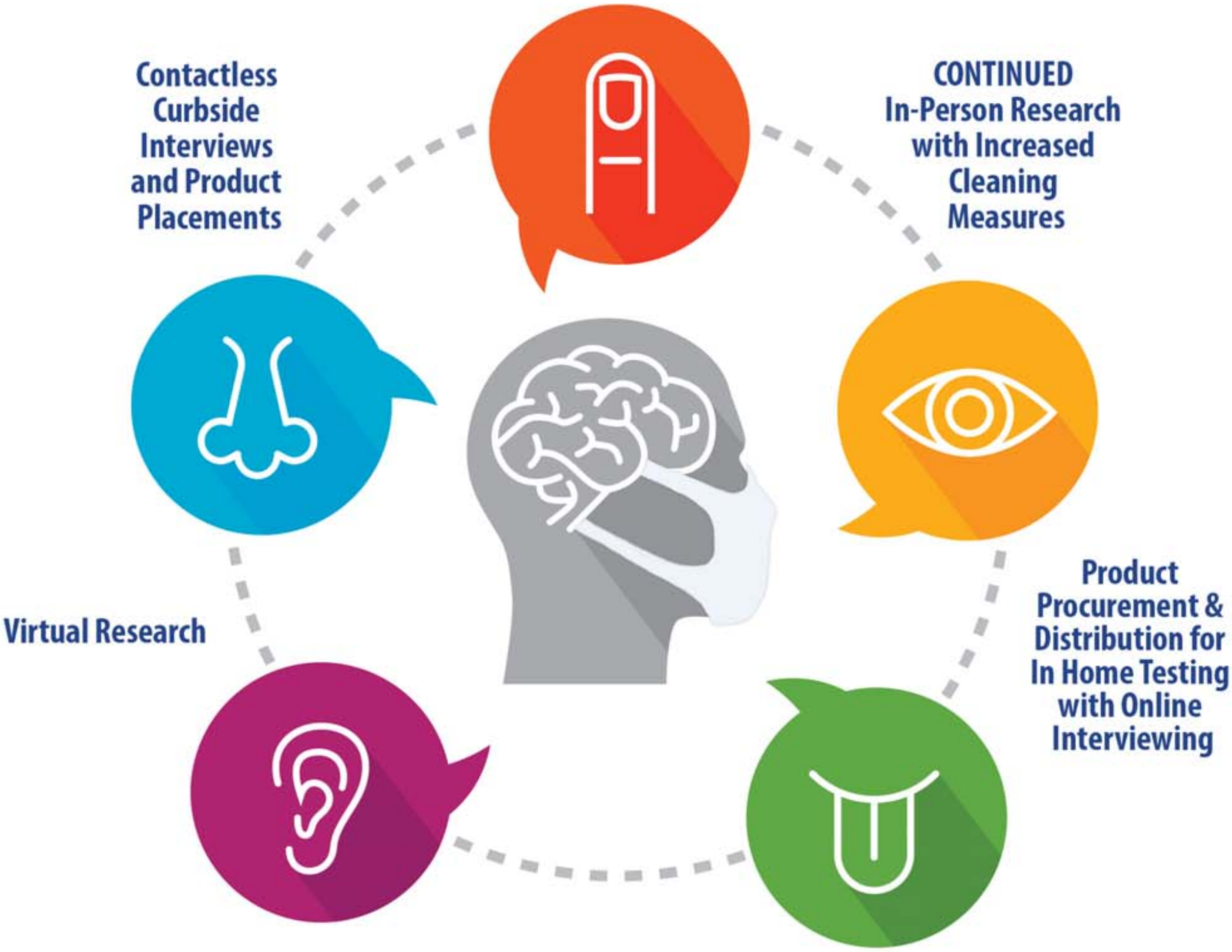

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