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ADVERTISING SECTIONS

18 Top Shopper Insights Companies

18 Top Sampling Research Companies

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July/August 2022
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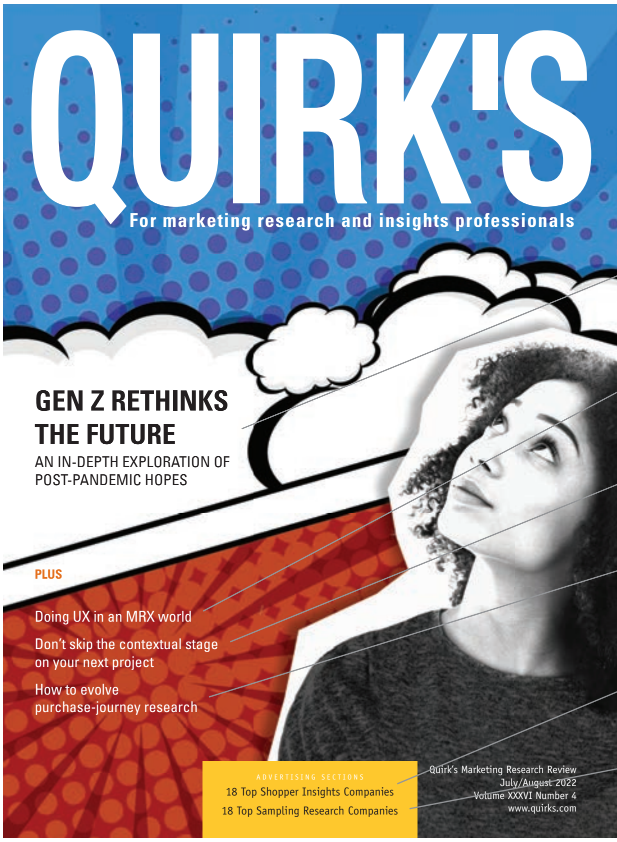

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Salary research

Don't miss the Quirk's Q Report coming out in September as part of the September/October issue of Quirk's magazine. This year the Q Report will focus on methodologies and internal pain points in the MR industry. The purpose of the report is to give corporate researchers a look into their world, helping them learn more about what their peers and colleagues are doing and also benchmark themselves and their departments.

••• industry partners

Job search resources with Quirk's

Are you looking for a new job? Quirk's is here for you! We offer several resources for those in the job market:

- Quirk's Talent specializes in identifying and placing professionals in the marketing research and consumer insights industry. Visit QuirksTalent.com.
- Quirk's job board makes it easy to view and post jobs – all completely free of charge! Visit Quirks.com/jobs.
- Research Careers blog offers general and MR-specific career advice from industry experts. Visit https://bit.ly/3x2J2qs.

// E-newsworthy

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How to ask race and ethnicity questions in a more inclusive way
https://bit.ly/3m1cTuk

5 customer experience trends to watch in 2022
https://bit.ly/3x06Jki

// Noted Posts

Quirk's Blog

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Research Industry Voices

Obtaining rich insights through contextual research
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Your online surveys could be violating GDPR
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Understanding demographic questions through implicit testing
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Research Careers Blog

Taking advantage of the Great Resignation
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When using LinkedIn, focus on quality content and engagement
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The assumptions and realities surrounding job references
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••• first-party data

Study finds discrepancies in marketers' personalization skills

Against a backdrop of increasing interest in data privacy, retailers that excel at personalizing their marketing can put themselves a step ahead in terms of data-gathering, according to a study conducted by marketing automation company Sailthru and Coresight Research. But they need to be honest in their self-assessments of their personalization skills, as the study found a disconnect between consumers' views and marketers' views in that area.

Consumers will share data to get more from retailers – when online and in-store – creating opportunities for an enhanced value exchange. Eighty percent of consumers are willing to share personal data to earn loyalty program benefits; 70% are willing to share their data to receive special discounts and offers; and 71% will shop more often with brands or retailers that personalize their communications.

While 71% of retailers think they excel in personalization in marketing, only 34% of consumers agree. Retailers surveyed cite e-mail as the fourth-most important channel for personalization, while consumers placed e-mail as the second-most important. Twenty-three percent of retailers and brands surveyed view social media as a top channel for personalization compared to only 11% of consumers. Providing personalization in areas that are rated poorly for customer experience, such as shipping and fulfillment, could provide measurable improvement for retailers, the study says.

••• consumer psychology

When to go easy on the science behind your product

If your product has been scientifically developed, how you sell it depends on what you're trying to sell: sensory pleasure or practicality.

In a study for the article, "Get your science out of here: When does invoking science in the marketing of consumer products backfire?" in the Journal of Consumer Research, researchers tested sales of a body wash that was marketed as pleasurable, for example, by highlighting its "indulgent scented lather." Consumers were less likely to buy it when it was described as developed using science, compared to when science was not mentioned. However, when marketing focused on practicality by describing its ability to "wash away odor-causing bacteria," consumers were more likely to buy it when it was described as scientifically developed.

"[M]arketers need to exercise caution when discussing the scientific process used to create products that consumers are buying for taste, enjoyment and other types of pleasure," says co-author John Costello, assistant professor of marketing at Notre Dame's Mendoza College of Business. "[B]rand managers wishing to use science appeals to promote a product that focuses on pleasure could target segments of consumers who are likely to trust scientists or take care to explain why science is necessary for creating the product."

Face to face research is an essential piece of the insights puzzle. By conducting research in person, you gain added context from body language, a more fluid group dynamic and added security and privacy measures. The right research environment for brands to uncover and explore insights that result in important business impact.
Aryn O'Donnell, Vice President of Fieldwork

As an industry, insights deserves a respected place at the table at any brand or inside any organization. But coming to that table with confidence requires total belief in the quality of the insights being shared. Face-to-face research delivers on that issue of trust. When you talk with a human, face to face, see their body language and understand the nuances of that personal interaction, you can deliver high fidelity findings.
Priscilla McKinney, CEO of Little Bird Marketing

Moderators are thrilled; End Users are thrilled; Respondents are thrilled – the excitement of doing in person research is all the rave right now. To hear our clients comment how much more insightful their research results have been has been so rewarding. Body language and group discussion delivers those deep insights that they have all been craving the past few years. Market Research is so important for all companies and each method has its own purpose based on each projects objectives. In-person is a vital part of those methods and has proven it will never be replaced.
Angela Lorinchak, President of Jackson Adept Research

#facetofacemrx

In-person remains an essential tool in any expert researcher's insights toolbox. There is no substitute for being with a consumer face-to-face and seeing and hearing the nuances and subtleties that you just can't get any other way. The richness from these interactions makes them in demand with successful brand marketers who want to truly understand consumers and how they see the world around them.
Jude Olinger, CEO of The Olinger Group

While online qualitative can work well for some shopper research issues – when you start exploring sustainability, structure, materials, or you just need a large shelf context, nothing is better than in-person qualitative!
Cliff Kane, Sr. VP of Behaviorally

By Joseph Rydholm, Quirk's Editor

Diving deep with Dichter


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Joe Rydholm can be reached at joe@quirks.com

An article on the Psychology Today website sent me down memory lane recently, prompting me to revisit an interview I conducted with Ernest Dichter in 1989 for an early Trade Talk column (https://bit.ly/3sOWnkH), less than a year after starting here at Quirk's.

The April 2022 Psychology Today article, "How Ernest Dichter brought psychology to business" by Lawrence R. Samuel, gives a brief but informative overview of the impact that Dichter's focus on consumers' underlying motivations had on advertising in the 1940s and beyond. Some credit him with coining the term "focus group" and there is debate as to whether he created the concept of motivational research or if his lifelong championing of the ideas behind it just made it seem that way. Nevertheless, the explorations of the deep-seated factors driving our decision-making as consumers he conducted for clients like Ivory Soap and Chrysler certainly changed the face of advertising.

As Samuel writes in his article, "Anyone working in fields in which psychology intersects with business – marketing, marketing research or advertising – should be familiar with Ernest Dichter. Before Dichter, what Franz Kreuzer and Patrick Schierholz called 'announcement advertising' was the norm, with factual argument the prevailing method by which to promote products. Dichter turned ad agencies into psychology labs, bringing the social sciences into what were basically factories of communication. With his depth interviews, Dichter was the first person to seriously challenge the Claude Hopkins school of 'reason-why' copy, which had dominated advertising since it was recognized as a legitimate field. 'His research provided advertising with a kind of radar to find its way through the darkness of the collective subconscious,' wrote Marcel Blenstein-Blanchet, founder of the ad agency Publicis."

Impish sense of humor

Dichter was in his early 80s when I interviewed him, just a few years before his death in 1991, and looking back I marvel at how, in those pre-internet days, I had simply sent a letter to his office in New York's Hudson Valley to arrange the interview and then called on the appointed day, speaking first to his wife Hedy Langfelder and then to him. For someone so accomplished he was generous with his time and I enjoyed his impish sense of humor.

(This is also a good time for a shameless plug for Paul Scipione's book "A Nation of Numbers," which I edited and Quirk's published, if you're interested in reading more about Dichter and others who helped shape the early decades of marketing research.)

The subject of my Trade Talk column was his recent trip the then Soviet Union to uncover "the soul of the Soviet consumer" following the burgeoning of capitalism after Mikhail Gorbachev's loosening of cultural and governmental restrictions. Granted, it's been over 30 years – times change – but especially in light of the current state of Russia and the war in Ukraine, it's hard not to feel a sense of loss reading the column's observations about the Soviet Union, knowing that what was nascent then (newfound freedoms, entrepreneurship, a sense of possibility) is now likely lost.

What's heartening, though, is the creativity Dichter exhibited in trying to get the insights he was looking for – and also how fresh the aims of motivational research (however you want to define it) seem today, in light of the movement away from depending on the (in)accuracy of what respondents say they feel or have felt or are doing or have done.

As I observed back then:

The work of a motivational researcher is devoted to uncovering the hidden reasons why consumers make decisions – reasons hidden especially to the consumers themselves. It is a difficult task, Dichter says, because to get at the "truth," you must ask the right questions in the right manner.

"When you want to know why, you run a number of risks," he says, "because by asking people for the reasons behind their actions, you can get erroneous, rationalized answers. And by making it too verbal, you also risk getting wrong answers, because you're asking the respondent to diagnose his behavior himself. The Greeks already knew that the most difficult job is to know one's self."

Across his long career, Dichter showed researchers the value of striving for new and different ways to hunt for the "why."

Standing out in a competitive industry

Perspectives from Joey Harmon of Harmon Research

What advice would you give to a client looking for a sampling company?

Almost all sampling companies preach quality. Find someone who takes ownership in their respondents and is transparent with you about their data-quality practices. Ask what the sampling company does for quality control. Are they looking at your actual data or simply sending you respondents – thus making data quality your issue not theirs? Our firm takes it a step further with our proprietary program DataDefense, a multi-step process where quality-control personnel review the data, line by line, to ensure high-quality insights. We are responsible for respondents and don't just send out samples to a survey platform. We differentiate ourselves by being researchers more than a sampling firm.

How can sampling companies stand out in a competitive industry?

Our customer relationships and service standards make us stand out. We currently work with over 30 clients and 30,000 completed respondents in any given month. Ninety-five percent of our clients are repeat customers. Rarely are two clients the same and it takes time to learn all the intricacies of each client's needs but doing so is the basis of a mutually beneficial long-term relationship. Turnover is a good indication of how a company is run and its staff is treated and – by extension – how it cares for its customers. We have an outstanding management team who makes it all happen and are proud of our low turnover rate.

How has Harmon Research evolved in recent years?

We started as a phone center 12 years ago, establishing a niche for hard-to-find targets. However, as we moved away from phone calling to online for our data collection, we remained the go-to company for hard-to-find respondents. Our biggest goal for 2022 is to increase our panel supply of African American and Hispanic respondents. Client demand is heavy here yet we see a large gap in the industry for these folks. Recently, we completed 400 surveys in a small DMA with 100% African Americans. It has taken a lot of work but we have learned several do's and don'ts that will guide future efforts. Two years ago, we would have turned away this work, claiming it couldn't be done. Four years ago, we would have done it via telephone. But today we expect our supply to double in the next few months and will continue to focus on quality respondents.

Harmon Research®

Joey Harmon, President and Founder
www.harmonresearch.com
714-881-2590

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Meet some of the influential executives who are driving change and innovation as leaders in the marketing research industry! Their dedication and expertise are elevating the industry and advancing techniques of the trade.

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Leading with authenticity: InnovateMR's executive women

InnovateMR is a fiercely independent sampling and ResTech company that delivers faster answers from business and consumer audiences utilizing technologies to support agile research. As industry pioneers, InnovateMR connects organizations with targeted audiences around the world and develops forward-thinking products to support informed, data-driven strategies and identify growth opportunities.

The InnovateMR team is dedicated to empowering female leaders at every level, including in the executive suite. Our female executive leaders, including Chief Executive Officer Lisa Wilding-Brown and newly appointed board of directors member Kristin Luck, have a combined 85+ years of experience with specialties ranging from product development to panel-building, and from full-service research to the cutting edge of technology-enabled research platforms.

InnovateMR is deeply committed to furthering DEI initiatives as a founding member of the Multicultural Insights Collective, an ongoing supporter of Women in Research (WIRe), the Insights Association IDEA Council, the GRBN and ESOMAR. We look forward to continuing to advance diversity in the market research industry while empowering businesses to make better data-driven decisions.

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Women-led insights and innovation firm

WYNNE TYREE, CHIEF SMARTY PANTS
MEREDITH FRANCK, CHIEF OPERATING MASTERMIND
STEPHANIE RETBLATT, CHIEF BRAINIAC
ALISHA SNOW, CHIEF BRAINIAC
DR. MICHELLE PORIS, QUANT SAVANT

When Wynne Tyree founded Smarty Pants in 2005, she never guessed the organization would partner with more than 200 of the world's most powerful companies. Nor did she envision the 62-person shop would boast 48 of the most talented women leaders and leaders-in-training in the research and insights community.

When asked to spotlight its female leaders, Tyree was committed to featuring all 48 of the powerhouses who drive Smarty Pants' success. From "Research Prodigies" to "Chief Brainiacs," these women have been instrumental to the growth and evolution of the full-service agency.

Those who call Smarty Pants their professional home range from Ph.D.s in child development, to experts in marketing to Baby Boomers, to creative whizzes who excel at bringing consumer narratives to life. They span from Los Angeles to Tampa to Boston and include expert moderators, digital qualitative pros, quantitative analysts, big-data jockeys and strategic thought leaders who are at the top of their games.

Smarty Pants' elevated emphasis on company culture helps attract and retain top talent. The company's unlimited sick leave, flexible schedules, paid family leave, monthly paid "happy hours" to relax and recharge, an in-house Head of Happiness, paid milk shipping services for nursing mothers, at-home offices and various other benefits are some of the ways Smarty Pants manifests its people-first ethos.

"We're an organization of passionate research practitioners and thought leaders who make our business, and the businesses of our clients, better. These women are the backbone of Smarty Pants and a reflection of our company mission 'to illuminate the business world with brilliant insights, inspiring stories and ingenious solutions,'" states Meredith Franck, Chief Operating Mastermind.

The award-winning research and strategic consulting firm excels at delivering breakthrough insights that spark innovation and activation across categories. With roots in youth and family research and marketing, Smarty Pants has expanded to include consumer insights work across life stages and generations. Learnings are used to guide product development, brand positioning, content creation and marketing efforts across platforms and channels.

www.asksmartypants.com
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203-847-5766

400 years of women supporting women

Fieldwork is in the business of support – supporting our teams, supporting our clients and supporting our industry. We remain strongly committed to promoting industry organizations that believe in the positive impact of women in insights. Fieldwork works hard to nurture an environment where our entire organization thrives. We are proud that our women in leadership roles hold more than 400 collective years of experience in our industry.

Fieldwork coordinates logistics and provides customized global project management along with hosting in-person, remote or hybrid research sessions where clients uncover insights for brand and business impact. As a qualitative research partner, we respect our industry by recruiting respondents according to project specifications and partnering closely with our clients to achieve their success.

Fieldwork is comprised of a diverse group of individuals with a common vision: meeting our clients' research objectives while adhering to industry standards and best practices. Our teams help define who we are and they are our proudest asset.

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A globally recognized leader in humanistic insights

JOHANNA FAIGELMAN
FOUNDING PARTNER, CEO – HUMANBRANDING INC.

Johanna Faigelman is the founding partner and CEO of HumanBranding, a full-service qualitative market research consultancy, globally recognized as a leader in human insights. As a veteran marketer with 20+ years of strategic brand-building experience, and a graduate degree in cultural anthropology, she has pioneered Applied Anthropology Thinking™ – a proprietary approach that pairs the application of anthropology with her expertise in business development, strategy and marketing. This marks a departure from the conventional approach to marketing and allows brands to meet their customer on a more human level. Johanna's innate understanding of what drives people's behavior allows her to unearth new and previously untapped insights, which she then translates into game-changing business and brand strategies. A highly sought-after contributor and speaker, Johanna has published several articles and lectured at industry conferences. Her unique anthropologically driven expertise has directly contributed to HumanBranding's growing global client roster extending across consumer goods and biotech/pharma, including partnerships with four of the top five pharmaceutical companies and the No. 1 CPG company worldwide.

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A new qualitative research training company

FOUNDERS: JOANNA JONES AND DR. KAREN SERATTI

InterQ Learning Labs is a qualitative research training company. Founded by Dr. Karen Seratti and Joanna Jones, the company offers 100% in-person training and teaches research in-context. The driving philosophy behind InterQ Learning Labs is that research is contextual, so it should be taught in context. This means taking students to the various places research can be conducted in (more casual spaces for tech/younger audiences, like WeWork; and formal spaces for B2B/highly confidential research – focus group facilities). All the in-person workshops are taught at these spaces and participants learn how to set up studies and use the latest research technology as they're learning foundational skills.

In addition to teaching foundational market research skills that include moderating and report writing, InterQ Learning Labs brings in renowned instructors who are leaders in their fields to teach classes. On the lineup for 2022/23 are classes that include social listening, UX, online research and multicultural research.

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Harness the power of consumer insights

JACKIE SHORT, DIRECTOR OF QUANTITATIVE RESEARCH, INSIGHTS IN MARKETING

Market research is all about understanding people – the people who buy brands and the people who market them.

When it comes to understanding people and the marketing landscape, Jackie Short is our guru. Harnessing the power of quantitative research and consumer insights, she designs studies, analyzes market research and presents findings that inspire organizations to build stronger connections with people.

Jackie's innate curiosity enables her to analyze statistics and dig deeper to identify the wants, needs, attitudes and usage shaping consumer habits and purchasing decisions.

As a Fortune 500 research director, she honed her ability to identify category drivers and growth opportunities. And at a time when most consumers care more about their health and wellness, organizations are gaining a wealth of knowledge from her contributions to research published by a world-renowned medical association.

In fact, recent studies indicate more people are prioritizing their mental and physical wellness, most consumers value convenience and lingering COVID-19 concerns influence purchasing decisions. For example, telemedicine is a rising force now that it is covered by more insurance providers and demand is growing for virtual visits with therapists, personal trainers and cosmetologists.

Inflation and habits adopted during the pandemic are also shaping consumer behavior, despite pent-up demand for in-person experiences. For instance, studies indicate demand is growing for higher-end DIY products and treatments that were once offered exclusively by technicians at day spas, salons and gyms.

Jackie's contributions to research and reports inspire Insights In Marketing clients to listen to the voice of consumers. Contact us for a complimentary consultation and learn how you can harness the power of consumer insights and connect more people to your brand.

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Premier sample provider

To grow our business sustainably, Quest is keen on facilitating the increasing demands of our clients while maintaining a focus on our core values. Supporting this, our directors of core client, Kaitlyn Lee and Kyle Sofianek, lead the project management teams with service excellence and employee development at the forefront.

Kaitlyn has a unique ability to defuse even the most challenging situations with her reassuring yet decisive approach. Engaging our clients with confidence, Kaitlyn has mastered the art of problem solving, especially with clients who require intricate project specifications. The abundance of respect from her colleagues is a testament to her strong work ethic and her capacity as an exemplary leader.

Kyle is a passionate and detail-oriented go-getter. Her thorough analysis of any nuanced dilemma guarantees the successful resolution of client inquiries. A team player at heart, she is always pushing project completion rates while supporting the professional development of her team. Her sense of humor and infectious laugh encourage genuine comradery and help cultivate the unique environment we promote at Quest.

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Inspiring the next generation of research

In 1999, Gail Apkarian built on a successful research career to start MarketView Research. Armed with a vision, she created an organization that offered the breadth of resources found in larger companies with the customer service, speed and innovation of a smaller, boutique firm.

Twenty-plus years later, MarketView Research has stayed true to its boutique-like service roots and today is a highly specialized, full-service product lifecycle research firm – fueling top brands with insights on today's consumer and e-commerce-driven market. The firm fuses traditional research techniques with evolving/innovative technology to test products to provide insights at every stage across the product lifecycle.

Alongside Gail, her management team includes SVP Jessica Cardella and VPs of client service Shanna Walsh and Lisa Mackey. Together, they are instrumental in guiding the firm's strategy and client growth.

"My role is not only to champion MarketView but to champion our next generation of women leaders. We've built a culture of opportunity that allows our leaders and their expertise to shine. This has enabled us to develop deep, long-standing partnerships with clients – which is at the core of our success and ongoing growth" says Gail.

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C+R RESEARCH Emerge Smarter.

Strategic partners for custom qualitative/ quantitative solutions

For over 60 years, C+R Research, a women-owned full-service marketing insights agency, has been helping brands grow by delivering great research, deep perspective and committed client service. C+R's clients value them as a strategic partner that designs innovative custom research programs to answer their most complex marketing questions. Clients also appreciate C+R's high-quality analytical insights, senior-level attention throughout every project and their "whatever-it-takes" philosophy on every client engagement, including challenging projects like segmentation research and category landscape research. With a vast toolbox of customizable techniques for traditional and online qualitative, quantitative and community-based research, they partner with clients both domestically and globally. While C+R is known for its expertise in the CPG industry, other industries they work in include consumer durables, restaurants and food service, health care and insurance, financial services and retail to name a few, as well as audience expertise in shopper, generations, youth and family, LGBTQ+ and multicultural consumers.

C+R is Chicago-based and proud to be a privately held business. Under the helm of its president, Robbin Jaklin, she, along with her other partners, is committed to helping create a more diverse, inclusive and equitable research, marketing and professional community. In fact, they have been champions of Hispanic and multicultural consumers and developed specialty research divisions, LatinoEyes and CultureBeat, which are comprised of in-culture researchers from diverse backgrounds. These cohort experts are devoted to advancing their clients' understanding of diverse audiences and consumer groups to aid them in implementing successful and transformative business initiatives that will acknowledge and celebrate the racial, ethnic and cultural differences in their marketing and the overall diversity reflected in our society.

C+R's passion and dedication for inclusion translates to a great workplace environment for its entire staff, and they were ecstatic to be named one of Chicago Crain's 2021 Best Places to Work!

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Helping patients share their voices

PAM CUSICK, SENIOR VICE PRESIDENT, RARE PATIENT VOICE LLC

Rare Patient Voice (RPV) provides patients and caregivers with opportunities to be heard by researchers working on products and services to improve lives. Today, RPV covers over 700 rare as well as non-rare diseases, spanning the United States, Canada, United Kingdom, Italy, Germany, France, Spain, Australia and New Zealand.

Pam Cusick's background in public health communications and research, coupled with her passion for patient advocacy, dovetail with RPV's mission and vision. As senior vice president, her focus is on the continued growth and success of RPV, with a focus on client services, business development, panel management, marketing and human resources. She has played a pivotal role in its growth since joining RPV, which has included a 250% increase in projects and total invoices since 2016. Pam is committed to giving back and supporting other women professionally. She is a member of the Women's Initiative Network at Kennedy Krieger Institute and is active in the WIRexec mentoring program.

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The smart, fun and caring women of MHN

All audiences. All methodologies. We are experts in recruiting and field management for the market research industry. Our services are specifically tailored to meet the needs of market researchers. We collaborate with qualitative research moderators and agencies from around the globe. Our team of experienced research professionals provide world-class services. We strive to be a step above the rest.

Each of our women have specific strengths. Tiffany assists Susan as executive VP and manages a multi-functional recruiting team and host of project managers including consumer, health care and B2B. Nicole serves as executive director of B2B and manages a multifunctional team. Elisa is a rock star health care research project director. Rexann serves as leader in our health care department. Rosslyn heads up a consumer team and has worked with Susan for 9+ years. Judy has worked with Susan for 19 years and she handles in-facility liaison work as a company VP. Modesty is one of our newest project managers; she hosts a team of consumer recruiters. Bianca is 22 and has been with Murray Hill National since she was 16 and worked as a part-time recruiter in high school.

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WiRe WOMEN IN RESEARCH 15 YEARS

DRIVING TRANSFORMATION

WIRe champions diversity in the marketing research industry by arming women with the tools to develop professionally, build connections and stay inspired. We believe in the positive impact of women in business. Our mission is to advance the contributions and voice of women in research, both for themselves and for the greater good of the industry.

This is your time to transform:

There are so many ways to get involved with Women in Research, Visit www.womeninresearch.org to find out more—and to help us celebrate 15 years serving the market research industry.

WIRE NETWORKING EVENTS

The foundation of our programming is our free, bi-annual events which feature educational components such as panel discussions and industry speakers along with informal networking. We host both in-person and virtual events all over the world. Sign up at www.womeninresearch.org/join-us to see what's happening in your area.

ONE-TO-ONE MENTORING PROGRAM

WIRe hosts an award-winning global one-to-one mentoring program, where mentees leverage the success of industry executives, while industry executives (both female and male) benefit from growing their leadership and mentoring skills in a one-on-one environment. Applications open in Q4!

WIRE ACCELERATE

WIRe Accelerate is a multi-module, virtual program that can be completed at your own pace. Participants who complete the program will receive a certificate of completion as well as an international cohort of like-minded Industry professionals.

WIRE+ WEBINARS AND ANNUAL WEBINAR SERIES

WIRe's annual webinar series is a virtual educational program built from topics requested by the WIRe community. We also pair with likeminded companies and organizations to host WIRe+ webinars: a sponsor-hosted session on topics important to our industry.

WIRE IN COLOR

The aim of WIRe's in Color group is to raise the visibility of Women of Color in and outside of the market research industry and to further progress the conversation of workplace inclusion by championing racial and cultural diversity and equity in our field.

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50/50 INITIATIVE

Through the 50/50 Initiative, WIRe maintains a database of female speakers in the market research community and helps match them with the best MR events. Working with the biggest names in the industry, we've developed actionable guidelines to help conference organizers recruit a truly diverse on-stage presence and improve speaker gender ratios.

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IN FOCUS

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

Q // Survey Monitor

••• entertainment research

Reflect my reality

Multicultural viewers want to see and be seen

Growth in digital video viewership is the fastest among younger generations of AAPI, Black and Hispanic populations, with the largest shares of multicultural populations being Millennials, Gen Z or younger, but these audiences still want more acknowledgement from entertainment creators, according to findings from digital media company My Code's Multicultural Entertainment report, which examines multicultural film and TV audience behaviors.

Representation. Multicultural viewers don't always feel understood by production studios and in turn, studios don't always make an authentic connection. While nearly all multicultural adults are frequent film and TV viewers, roughly eight in 10 want to be considered during development but only a third feel the industry understands them.

Diversity in talent and production. Overall, multicultural audiences want more authentic representation in TV and movies; 65% want more depictions of multicultural people in ways that break down racial stereotypes, 67% want more diversity among talent playing leading roles and 67% also want more diversity among the directors and writers that influence content.

Movies. Eight in 10 multicultural adults view movies weekly and it is clear that they value flexibility when watching movies at home, as streaming is the leading at-home movie access point. Over half of multicultural audiences watch action, comedy, drama or adventure movies, revealing that movie genre choice is not monolithic.

TV. Nearly nine in 10 multicultural adults watch TV shows weekly and there is evidence that there is more preference for drama and action/adventure shows, with 49% typically watching each genre and 35% indicating that they typically watch sitcoms. In other words, drama and action/adventure are likely popular TV media diet staples, with other genres filling out individuals' TV consumption similar to surrounding content.

Awards shows. Less than half of multicultural audiences feel that major American awards shows recognize diversity in category nominations, which is reflected in fragmented awards show viewership behaviors. As a mirror for the industry, current awards show engagement reflects the role that authentic on- and off-camera representation has in audience-building.

The report used data collected from over 1,000 adults representative of all main geographical areas of the United States, ages 18-64, between December 22, 2021, and January 3, 2022.

••• shopper insights

Shopping goes social

Study finds generational differences in those buying via social networks

Digitally immersed Gen Z shoppers (18-24 years old) anticipate using visual-first social networks like

••• shopper insights

Growth opportunities

Consumers say stores, restaurants can do more to improve e-commerce

Results from a consumer survey conducted by store lifecycle management firm Tango affirm that the physical store remains an important fixture for American consumers. The survey set out to understand how shopping and dining habits and behaviors have changed after two years living through a global pandemic, which accelerated the shift toward consumer demand for a seamless in-store to e-commerce shopping experience. While consumers are satisfied with the changes stores and restaurants have made over the last two years to accommodate for this shifting demand, they believe there is still room to make the shopping and dining experience better.

The findings provide insights into how consumers have adjusted to the changing retail and restaurant environment and point to continued innovation becoming an expectation in the retail experience.

Consumers are more satisfied with retail shopping experiences than they were last year but there is room for improvement:

More innovation, please. Over four in five (83%) say stores still need to become more innovative in how they utilize their retail space for in-store shopping, order fulfillment and pickup.

Shoppers want it all. Eighty-nine percent of consumers want to continue having options to shop in store and online with either in-store pickup or delivery.

The seamless shopping experience is here to stay. Two years into the pandemic, a seamless online-to-store experience continues to grow in importance for most Americans (88%).

More changes, more satisfied customers. Americans are more likely to be satisfied with their options for an online-to-store experience than they were one year ago:

-- 94% of shoppers are satisfied with the options they have for in-store shopping, pickup and delivery from stores and/or chain restaurants compared to 87% a year ago.

-- 94% of shoppers enjoy having the ability to buy online and have options for picking up purchases or having them delivered compared to 86% a year ago.

-- 91% of shoppers like the ways stores have integrated their online presence with the in-store experience (e.g., providing designated parking spaces for curbside pickup) compared to 86% last year.

-- 92% of shoppers report stores have made it easier or faster to pick up or receive online orders instead of waiting days for delivery from larger fulfillment centers, as opposed to only 84% a year ago.

Essential stores adapted to fit consumer preferences slightly better than specialty stores:

Shoppers appreciate convenience. Over nine in 10 U.S. adults say big-box retailers and supermarkets/food stores have adapted well to the changes of the past two years (94%, 93%), as opposed to specialty retailers and restaurants (88%).

It's not just about COVID anymore; consumers consider inflation and environment when shopping:

Inflationary challenges. Two-thirds of Americans (68%) say where they shop has changed over the past few months due to inflation and/or higher gas prices. Those with a household income of $75,000 or more are more likely than those with lower household incomes to say where they shop has changed over the past few months due to inflation and/or higher gas prices (73% vs. 63-66%).

Reduce, reuse, rethink where you shop. Three in five (62%) say environmental concerns now influence whether they shop in-store or online. Men are more likely than women to say environmental concerns impact whether they shop in-store or online (65% vs. 59%), and those with a household income of $75,000 or more are more likely than those with lower incomes to say environmental concerns influence this choice (71% vs. 51-57%).

The survey was conducted between April 28 and May 2, 2022, and drew 2,018 completed responses from U.S. adults ages 18 and older across the country.

Instagram, TikTok and Snapchat to make purchases in 2022, while Gen X (41-56 years) and Baby Boomers (57-75 years) plan to increase their purchases on Pinterest and Facebook, according to data from Sprout Social, a social media management software firm.

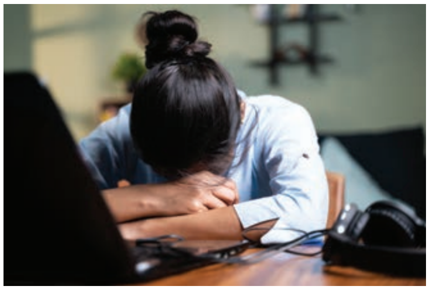
Sprout Social surveyed nearly 1,000 consumers in the U.S. to determine how they planned to shop on social media in 2022. Additional findings from the survey and trends related to social commerce include:

Consumers are embracing immersive features, including virtual reality (VR) and augmented reality (AR), for social shopping. As the metaverse begins to take shape, social shoppers are embracing features like VR and AR to make purchases. More than 85% of consumers who currently use VR and AR have already started social shopping. Plans to embrace this new modality of shopping skew heavily toward Gen Z (32%) and Millennial (30%) consumers.

Inclusivity matters to social shoppers. Sixty percent of shoppers report that they're more likely to buy from brands that highlight inclusivity in their content, for instance featuring different races, ethnicities or gender identities in ads and feeds. Inclusivity is especially important to younger shoppers, with 73% of Gen Z and 72% of Millennials citing this as a purchase factor.

Friends remain influential in consumer purchasing decisions. Recommendations from friends rank high in impact across all age groups, serving as the primary source of influence for consumers ages 18-40, even ahead of influencers. The same is true for Baby Boomers, who still trust friends and family the most.

"Our survey findings make it clear – the opportunity has never been greater for brands to leverage the social storefront to create powerful, frictionless connections with customers," says Jamie Gilpin, CMO, Sprout Social. "As the majority of consumers have already made a purchase on social media or plan to do so this year, brands that embrace social commerce as a key part of their omnichannel strategy will more effectively pique the interest of consumers, help drive revenue and outpace the competition in 2022 and beyond."



••• employee research

Still struggling on the job

Burned-out workers welcome employer leadership on mental health

In the third year of the pandemic, around half of workers report continuing to feel burned out (51%) and stressed (46%) at work and, despite record levels of resignations in recent months, over a third of workers (34%) are still considering quitting (vs. 41% in 2021), according to findings from a nationwide survey by online behavioral health care company Talkspace conducted with The Harris Poll.

As explored in its Employee Stress Check Report 2022, the survey of full-time employees found that the majority of those citing continued burnout (59%) say it has gotten worse since last year.

While the stresses experienced during the pandemic have persisted, these new findings indicate that employers can retain employees by signaling that mental health is prioritized in their workplaces: 57% of all workers would be likely to stay at a job if it offered more mental health services, and even more so amongst those considering quitting (66%).

Leadership can make a difference throughout the organization, as employees who say their managers take steps to protect their mental health are significantly more likely to find their work fulfilling (86%) and less likely to feel stressed or burned out by work (41%).

Working parents in particular are more impacted when it comes to workplace mental health, with 53% experiencing burnout and 42% considering quitting, significantly higher than all workers (34%). Balancing work and family responsibilities is difficult for 60% of all working parents, and 44% of parents report missing more than one full day of work since the start of the year due to parenting responsibilities. The impact of work stress is particularly acute among working mothers, as 58% of mothers surveyed say trying to balance work and family responsibilities has caused them stress or burnout, and more than half report feeling less productive, versus 50% of working dads. Compared to working fathers, working mothers were more likely to have found it difficult to be a working parent during the past two years, and less likely to believe balancing work and parenting would get easier next year.

The youngest end of the workforce (Gen Z and younger Millennials), aged 18-34, are significantly more likely, compared to the rest of the workforce, to feel burned out (59%, compared to 51% for all workers) and to consider quitting their job in the next six months (42%, compared to 34% for all workers). Gen Z workers in particular reported alarming levels of burnout (73%).

Other notable findings from the survey include:

Stress and burnout rank just below inadequate pay among the most common worker complaints.

Thirty-two percent of workers are likely to consider quitting their job in the next six months – among those, 59% are more likely to quit compared to last year.

Those most at-risk for quitting include working parents (42%), younger workers (42%) and service-oriented workers (42%) – those working in retail, education, hospitality and health care.

Service-oriented workers also reported the highest levels of day-to-day stress (56% vs. 46% of all workers).

Fewer than one in three U.S. workers (29%) rate their mental health as "excellent," lower than the 21-year record low (34%) among the general public seen in Gallup polling.

Mental health services are critical to worker retention: As previously noted, 57% of those considering quitting, as well as 70% of young workers and 68% of parents, say they are likely to stay in their current position if they received more mental health services.

While 74% of workers say more paid time off, like mental health days, would make them consider staying at their jobs, fewer than two in five workers get and use most of their PTO.

The poll was fielded during March and April 2022 and surveyed 1,400 full-time employees aged 18+ in the U.S., with an oversampling of nearly 800 working parents.

••• insurance research

From agent to advisor

Younger homeowners see different roles for insurance provider

Fifteen years after the onset of the Great Recession, impacts are still being felt on homeownership and insurance usage in the U.S. A TransUnion study found that Millennials and the youngest Gen Xers experienced significant delays in homeownership due to the Great Recession. In addition, out-of-state migration patterns – partially driven by the COVID-19 pandemic – pose risks to insurance providers' books of business.

Findings are from a survey of 2,791 consumers conducted between February and March 2022. The survey focused on consumer near-term coverage needs across multiple lines of business and provided a better understanding of what kinds of support and communication consumers expect from their insurance providers.

"Millennials and even parts of Gen Z are coming to the housing market for the first time later in life," says Mark McElroy, executive vice president and head of TransUnion's insurance business. "They're taking a different approach to engaging with their insurance providers and expecting services and counsel beyond basic coverage of their homes."

Percentage of adults who became homeowners by age 30:

Mid-Gen X (born 1971-1975): 47%
Youngest Gen X (born 1976-1980): 39%
Oldest Millennials (born 1981-1985): 29%
Mid-Millennials (born 1986-1990): 25%

Those gaps are finally beginning to narrow as Millennials now drive the majority of first-time home purchases, accounting for more than half of purchase originations by the end of 2021. As these cohorts reach typical adulthood milestones, many think differently than previous generations about how they utilize and engage with insurance providers.

TransUnion's data analysis has found these groups expect digital shopping experiences as they compare policies and prices. However, their primary channel for direct communication at purchase and claims is a phone conversation.

In addition, the survey findings provided insights on how and why consumers want to engage with their insurers. Responses differed by generation. For example, Baby Boomers indicated they prefer not to hear from their insurer unless they reach out first, while Gen X is interested in upcoming weather events impacting their area. Millennials are looking for auto and home safety tips and maintenance reminders or evolving coverage needs, while Gen Z is looking for data about how they are driving through telematics.

"We're seeing that consumers have come to expect quite a lot from their insurance carriers beyond the basic coverage for damages and losses," says Michelle Jackson, senior director of TransUnion's personal property and casualty insurance business. "Increasingly, people want them to serve as trusted advisors and partners who can help avoid losses in the first place."

Among other generational differences were changes to migration patterns. Predictably, Gen Z and Millennials are currently moving at higher rates than members of Gen X and Baby Boomers. However, comparing the migration behaviors of Millennials with those of Gen Xers when they were the same age revealed significant differences. Specifically, nearly 4% of Millennials aged 25-40 are moving out of state, whereas only 1% of Gen X did so at the same age.

This trend was driven partially by people leaving large cities during the pandemic but also, more broadly, by a desire for a more affordable cost of living. Regardless of the reasons, this has implications for insurers who may be at risk losing customers who move out of state. Conversely, it may also present challenges to consumers, as many of them are moving to southern regions that are more prone to severe weather, making it difficult to attain new policies that offer sufficient coverage at an affordable price.

"While more Gen Zers and Millennials might move out of state, they are also actively seeking counsel about these kinds of decisions," says Jackson. "Insurance providers can leverage data to identify those most likely to leave and offer guidance about some of the unexpected impacts of those changes. [Providers] who view themselves as less of a commodity and more of a consultant will be better positioned to win and retain business."

Models for calculating brand equity

| By Jerry Thomas

snapshot

Jerry Thomas explores three approaches to brand equity tracking.

We can think of brand equity as the accumulated reputation and goodwill of the brand or brands owned by a company. This is a greatly simplified definition but it will suffice for now. All other factors being equal, brand equity is the very best predictor of a corporation's probability of long-term success. In well-managed corporations, senior management stays focused on building and maintaining brand equity for all of their brands among the most important target audiences (customers and prospective customers).

An important secondary reservoir of brand equity resides in the minds and hearts of a company's employees. They must buy into, believe in and support the corporation's brand story. A third repository of brand equity exists in the minds of the trade and distribution channels. Do they have faith in the company and will they support its brands? The last store of brand equity – at least for public companies – is the attitudes of investors, shareholders and stock analysts.

Regardless of the target audience, brand equity exists solely in the minds and emotions of human beings. Brand equity lives in the feelings, memories and imaginations of target audiences, not in real estate, factories, equipment, inventories, retail stores or other assets.

To optimize brand equity, these three types of models can play a role:

- Diagnostic models: These help brands understand the building blocks and architecture of existing brand equity.
- Prescriptive models: These can be used to formulate optimal strategies to maximize brand equity over time.
- Tracking models. Once a sound brand strategy is in place, it's important to track the cumulative effects through repeated surveys of target consumers, employees and other target audiences.

(Brand equity tracking models are the focus of this article but keep in mind that other types of brand equity models exist.)

Brand equity tracking model components

The first measure of brand equity is brand awareness. A brand with no awareness has no brand equity. The higher a brand's awareness, the more brand equity a brand enjoys. Generally, the higher brand awareness is, the more favorable consumers' perceptions of and associations related to the brand tend to be (there are rare exceptions to this rule but it's almost always true).

Brand awareness is traditionally measured by two questions: the first to measure unaided brand awareness followed by a question to measure aided brand awareness. Total brand awareness is the combination of the two measures with any duplication or overlap eliminated (i.e., a net result). These measures are generally reported as the total percentage of the target population or target market that is aware of the brand.

Unaided brand awareness tends to understate actual brand awareness, while

aided brand awareness or total brand awareness tends to overstate actual awareness. True brand awareness falls somewhere between unaided and total brand awareness but typically closer to the total brand awareness number. Awareness alone is an extremely important measure and must be a variable in any brand equity tracking model but let's not forget that awareness can be positive or negative – and this metric must be incorporated into the model.

Brand awareness is typically measured as a one-dimensional variable (think of a graph showing height of awareness or percentage of those aware) for each time period but we could also think of it as two-dimensional (percent aware by depth of awareness) for each time period. That is, a consumer can be aware of a brand (and count as part of that brand's awareness) but that awareness might be shallow and fleeting, or that awareness could be deep and abiding. Depth of awareness or strength of awareness is another variable in brand-equity modeling.

Another important measure of a brand is consumer knowledge. How much do members of the target market actually know about a brand (and the accompanying products or services)? Knowledge overlaps depth of awareness to some extent but it goes beyond strength or depth of awareness into the character and makeup of that awareness. It's another variable to consider for the brand equity model.

A brand's image is another core measurement of brand equity, an extension of the knowledge dimension. Brand image is a reference to all of the associations, values, feelings, emotions, perceptions, mental pictures, symbols, smells, sounds, music, stories and colors linked to a brand. These image dimensions are typically measured with some type of sensitive scale, such as nine- to 11-point anchored grid scales, but there are many ways to measure brand image and several different question types can be used.

Now that we have a sense of the key measurements, let's look at some models to link these variables.

Let's start with some simple examples of brand-equity tracking models to convey the basic concepts and then discuss a more complete model. The first model we might build is a total brand awareness model. It's very simple:

Brand Equity = Total Brand Awareness

Total brand awareness is measured each month, each quarter or every six months to monitor total brand awareness trends over time. This model has only one independent variable (total brand awareness) but it is a model nevertheless and is one way to define and track brand equity over time. This is not a perfect standalone model but it is commonly used across many different product and service categories. Ah! But that's too easy, you say! So let's make the model a little more complicated.

We want to keep total brand awareness, since it's such an important variable, but let's add a second variable to the model, unaided brand awareness. We can think of unaided brand awareness as an indicator of depth of awareness or strength of awareness. So the new brand equity model might take the following form:

Brand Equity = Total Brand Awareness
+ Unaided Brand Awareness

Wait, you say, aren't you double-counting unaided brand awareness? True, but generally total brand awareness is much, much higher than unaided brand awareness, so the double-counting is not as big a weakness as you might suspect and this model gives you a constant equation to track brand equity over time.

But wait one more minute, you say. There are some new or poorly defined product categories that make it almost impossible to measure unaided brand awareness. Good point! This model won't work in those categories. Also, when you add the two variables together, drop the percent signs (so 58.6 % becomes 58.6, or 14.7% becomes 14.7). This model would give you a numeric value for brand equity somewhere between 0 and 200.

Before we move on, another way to weave total brand awareness and unaided brand awareness together could be a multiplicative model. That is, instead of adding total brand awareness to unaided brand awareness, you could multiply the two variables together. The model would look like…

Brand Equity = Total Brand Awareness
x Unaided Brand Awareness

This is similar to length-times-width, which equals the area of a rectangle. That is, height (total brand awareness) times depth (unaided brand awareness) equals the total area of brand equity at a point in time. Again, you would get rid of the percent signs and make sure both total brand awareness and unaided brand awareness are numbers greater than 1.0. You don't want to multiply if one of the numbers is below 1.0 since that would make brand equity decline as a result of flawed arithmetic. Okay, you say, this is all elementary school stuff. Can't we do better?

So, let's build on these basic concepts and see if we can design a simple brand equity tracking model. As before, let's begin with total brand awareness. A reasonable model might look like the following:

$$\text{Brand Equity} = X + ((V + K)/2) + Y$$

Where…
X = total brand awareness
V = percent who say they are "very familiar" with brand
K = unaided brand awareness
Y = brand image profile

Drop the percent signs since they would no longer serve any meaningful purpose. In the middle term within the model, we are taking an average of two variables (V and K).

So there you have it, a simple model of brand equity that incorporates some of the major elements of brand equity. This brand equity score could range from 0 to a maximum of 300, given the stated formula and assuming brand image is a score less than 100.

As you can see, the final result is an arbitrary number or score but it is a consistent and inclusive metric to track brand equity over time, taking some of the important variables into account. The same basic model could be applied to competitive brands (as an approximation), so that your brand equity trends could be roughly compared to a competitors' brand equity trends (but be wary of head-to-head comparisons, because brand equity cannot be measured precisely across brands if the attendant strategies are different).

Extensive investigation and analysis

The process of building a relevant, predictive brand equity tracking model is more complicated than these simple examples and involves extensive investigation and analysis upfront to identify the key variables, learn how to measure those variables, determine the weights to assign to variables and develop hypotheses about the structure of the model itself. These investigations would involve in-depth qualitative research among key target markets, followed by choice-modeling experiments to define an optimal brand strategy.

The goal is a predictive (or forward-looking) model. That is, if we incorporate into the model the brand image dimensions that are predictive of long-term success, then as brand equity goes up over time, the brand's market share should increase, or brand loyalty should increase, or pricing power should increase (after appropriate lag times). The brand strategy itself would serve as the foundation for the brand equity tracking model. Each product category, company and brand is unique, so the brand equity tracking model must be customized to fit each brand.

Building a predictive brand equity tracking model is difficult but quantifying and monitoring a corporation's most valuable brand assets is a wise investment for the long-term success of a business enterprise.

Jerry Thomas is president and chief executive of Decision Analyst Inc. He can be reached at jthomas@decisionanalyst.com.









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18 TOP SHOPPER INSIGHTS COMPANIES

Consumers are the most important part of the retail industry. Being able to understand your audience can offer you deep insight into the products and services they currently buy and use and those they would be interested in buying and using in the future

These companies offer a broad range of shopper insight services including pricing studies, virtual reality, package testing and immersive shopper labs, all of which allow you to gather reliable insights throughout each step of the shopper journey. Shopper insights provide valuable consumer information including their buying habits and in-store decisions and behaviors. Here is a list of 18 marketing research companies that offer shopper insight services.

Decision Analyst

Decision Analyst

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

Decision Analyst offers an array of services to help clients develop and sustain winning brands. The firm melds in-depth qualitative investigations, strategic survey research, advanced analytics, mathematical modeling and simulation to solve complex marketing problems. We also offer customized shopping research services and can recommend the quantitative and/or qualitative technique(s) best suited to your research needs. Decision Analyst's qualitative services include in-person focus groups and depth interviews, webcam focus groups and depth interviews, time-extended online forums, online

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Explorer Research

Founded 2004 | 50 Employees
Marc Inkol, President

Explorer Research is a leading shopper research company providing innovative online and in-person research solutions for over 18 years. Explorer has the broadest range of immersive environments including 3D online and in-person VR, 2D online environments, immersive qualitative simulated websites and shopper labs. Explorer immersive environments can be used to measure reactions to packaging, planograms, POSM and store design. CX and UX can be optimized via our online DecisionPATH Customer Journey service that identifies and optimizes important touchpoints along the customer journey. Immersive online research helps optimize digital touchpoints through testing in-situation on real websites helping our clients to optimize digital advertising, promotion and hero images. Explorer measures emotional drivers via eye tracking, facial coding, EEG and implicit testing techniques. E-mail us today at info@explorerresearch.com to find out more about our immersive behavior-based online shopper solutions.

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EyeSee

Founded 2012 | 141 employees
Olivier Tilleuil, CEO

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Steve Raebel, President

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Forsta

Founded 2021 | 700 employees
Rudy Nadillo, Senior Vice President Business Development

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GroupSolver

Founded 2014 | 41 employees
Rasto Ivanic, CEO

GroupSolver is an intelligent research platform that helps brands and organizations ease the stress of research and data analysis. Through its proprietary AI Open-End™ technology and robust quantitative methodologies, GroupSolver allows researchers to efficiently quantify the qualitative and quickly gather insights tailored for their business needs when they need it. From concept testing and brand perception to customer and employee experience, GroupSolver has the technology and analytical expertise to confidently accomplish your research goals. And beyond that, GroupSolver serves as your thought partner to uncover the "why" – helping you tell the story behind your data while lending the confidence you need to make the most informed business decisions possible. Check out our retail insights article here: https://bit.ly/pricenotright.

Phone 1-619-728-6505
https://www.groupsolver.com

Informed Decisions Group, Inc.

Founded 2004 | 10 employees
Colin Valdiserri, CEO

Informed Decisions Group Inc. is a full-service behavioral insights firm specializing in shopper insights, visual sciences and conversion measurement. As the first company to successfully model purchase behavior to visual attention, IDG has innovated mobile eye-tracking solutions for shelf insights, package optimization and virtual shopping for over a decade. Our approach leverages an in-house quantitative and qualitative fusion with the most innovative technologies in life-sized virtual shopping, visual and emotional measurement including micro-expression coding and neuro-measurement. Since 2004, IDG's clients have benefited from our team's unique backgrounds in consumer psychology and decades of experience in the behavioral sciences.

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Insights in Marketing

Founded 1989 | 9 Employees
Ron Raskin, CEO and Owner

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••• gen z research

Locked down no more

For Gen Z after the pandemic, what's next?

|By Edward Appleton and Tobias Frei

snapshot

An in-depth exploration of changing Gen Z needs and wants found implications for brands, companies and HR managers.

How will Gen Z emerge when the COVID-19 pandemic finally disappears completely? This was the main question behind an in-depth qualitative exploration of Gen Z value systems and attitudes conducted by our firm Happy Thinking People in the third quarter of 2021. We engaged on a series of digital in-depth interviews, inviting Gen Z participants to think forward to a time where the world was virus-free.

Previous studies had revealed a remarkably resilient Gen Z viewpoint – one that had developed a set of strategies to cope with crises, including COVID-19. We also knew about their activist, politically and socially engaged mind-set, with ambitions to make a difference on a raft of bigger issues such as climate change and social justice.

Would any of this have changed or evolved? What sort of mental shifts or resets could we expect, following two long years of challenging times and multiple lockdowns?

We wanted to find out how the teenagers' felt, reflecting on the long months of pandemic-induced isolation but mainly focusing on looking forward to how they anticipated and envisaged the future.

Talking to the same group of kids and teenagers in Europe, Asia and the U.S. as with previous waves, we explored the following areas:

- How had lockdown affected them? Were there any changes in rituals or beliefs?
- How did they anticipate behaving after lockdown was totally over? What were their plans and priorities? What had changed?
- What would be an ideal society for them and how realistic or optimistic were they?
- What were their dreams and hopes for their future social, personal and working lives? We also explored their views on the specifics of the workplace as well as the role and responsibility of brands.

We used storytelling and projective techniques to help participants articulate and imagine a new future.

All were asked to imagine a situation where a ship is leaving the harbor of a coronavirus-infected world behind. What would they take with them into the future and what would they leave behind? Redocking a few days later in their new virus-free hometown, what do they find? What's changed?

We also presented them with a range of verbal concepts describing various future scenarios.

These focused, in-depth explorations were enriched by insights from project work amongst Gen Zers across the globe involving more than 300 participants in numerous categories. The results are fascinating for brands, companies and HR managers in particular. Two major themes emerged.

Firstly, a strong vein of self-reflection. As with many other cohorts, Gen Z folk took time to reevaluate, reassess, reprioritize – from their own immediate surroundings to the world around them. Whilst this modified their sensitivities, it didn't change the basics, which we will explain more later.

Secondly, a sense of powerlessness and frustration during lockdown led to a magnification and amplification of their existing concerns. Being held back forcibly from doing things close to their hearts seems to have fueled these young adults' determination to come back stronger. More on this later as well.

Other focus areas covered here are as follows: changing attitudes towards digital versus the role of in-person, real-life experiences; "togetherness," or the strengthening role of the peer group versus individual wishes; a redefined concept of hedonism; reimagining work and the workplace.

Time...to reflect and reevaluate

"Something clicked. I took time to ask myself questions about what I really wanted to do and become."

The pandemic, and the lockdowns in particular, were tough on teenagers and young adults. Their footloose period – planning and enjoying parties and gap years; dreaming of what they were going to do in their mid-20s; making new friends; experimenting with all sorts of new experiences…this was all interrupted, with the long-pause button pressed.

We know from previous studies that this cohort of younger people has grown up with crises, learnt to be resilient. They're invariably adaptable, pragmatic, realistic, hands-on.

COVID-19 was in one sense "just another crisis" – but one that was more sustained and more immediately real. For those looking to find a job, for example, temporary or permanent, the prospects were diminished radically.

It led to prolonged phases of self-reflection and a shift from outward to inward orientation. The action-oriented "let's do it" attitude morphed into "let's focus on essentials."

Many reported on how they now appreciated things they'd taken for granted. Friendships in particular were reevaluated. Many observed a shake-up, discovering who their real friends were and who disappeared quickly after a superficial DM on WhatsApp or TikTok.

Their empathy levels also seemed higher, with a greater appreciation of others' situations, views and outlook. Fewer disagreements and falling-outs, digital spats.

Many embarked on new activities and hobbies, from sport to knitting to a new musical instrument. Or giving their own bedroom a makeover, making it into a real nest. Going for walks. Ways of not just filling time but coping strategies, providing a sense of purpose, meaning.

This transferred onto their expectations of future work. Doing meaningless, repetitive tasks or settling for lowly, unrewarding jobs isn't going to cut it for long with tomorrow's trainees and apprentices. More on this later.

When we discussed their convictions and commitments, however, there was a strong sense of nothing much having changed. Global warming, social justice, diversity, inclusiveness…these are issues they still care about strongly. The determination is still there – likely stronger than ever. Voices that have been on mute are straining to be heard.

Which takes us on to the next areas: magnification and amplification.

Loud and louder

"Everyone must draw conclusions and lessons from this year and if we all want to continue to live on this planet in harmony, we must take care of it."

Whilst the pandemic seems to have made Gen Z more empathetic and more appreciative of how things hang together, there seemed no real change in their basic values and belief systems. The ideal Gen Z post-pandemic world described was familiar from previous studies: all individuals living as equals; discrimination in all forms, shapes and sizes eradicated; sustainable living and consumption patterns the norm. Their motto remains "all united for a better world."

What's changed is the urgency. To put into practice all the new ideas and plans they had time to think of during lockdown.

Lockdown was a time of anxiety – and impotence. Suddenly life and the scope for action was limited to a small room, often literally. For people typically exhibiting a strongly proactive mind-set, this was hard.

As the pandemic recedes, all these bottled-up urges to act will likely emerge with renewed energy. What will this mean in more detail? Our conversations revealed an even more political outlook – demanding the rights to be involved in decision-making was a strong theme. The right to vote was mentioned often; some planned to join a political party, go to demonstrations or go on strike – effectively putting activity back into activism.

We heard skepticism about capitalism as an organizing force – it being seen as driven by narrow self-interest and lacking in solidarity.

Their demands on brands and companies are clear: transparency, honesty, accountability, consistency. At the same time, they remain realistic, not quite resigned, but believing the profit motive to be the general default mode.

Sustainability is just as important as ever. But interestingly it's becoming a hygiene factor for Gen Z – they seem to take it for granted, that brands are on board with and acting sustainably.

Digital? Let's go offline.

"I started to gradually reduce my social media consumption. Now I am at three hours a day and I will probably continue my detox."

Gen Z are often described as digital natives. True enough. But the assumption that they spend all their time on smartphones is not accurate, as we've documented in previous studies. The real world is so important to them for many areas of their lives, especially for more important moments and interactions.

In this study, they revealed an even more strongly ambivalent love-hate attitude towards online. Sure, it has been a lifeline in all sorts of ways during the pandemic – for entertainment, information, keeping in touch with their friends and more. But the downsides became clearer. Many reported on digital overkill: of aimless smartphone scrolling, reaching online ground zero. This sits badly with an activist, let's-do-it mind-set.

Beyond a sense of online ennui, there were a number of specific digital disenchantments, which we can touch on briefly.

E-education: This was a lowlight. The learning experience of sitting in front of a computer invariably proved a poor substitute for real school life. Those having to prepare for important exams on their own, with inadequate support, felt abandoned.

FOMO took on new forms for those starting higher education. Parties, meeting new people? Postponed, maybe not repeatable. Digital equivalents appeared pale, non-tangible, not so real. Sense-making structures and rituals were missed.

Some came to view social media in general with greater skepticism, having experienced firsthand how fragile and transient online friendships can turn out to be.

In contrast, real-life experiences and interactions, the world of touch-and-feel, of physical contacts, gained in appeal, boosted no doubt by their scarcity during lockdown. Three areas stood out in particular: partying, travel and shopping.

Opportunities to party or celebrate were much reduced during the pandemic. We heard of celebrations under the radar – also of smaller, cozy gatherings of friends.

So, the urge to catch up post-COVID-19 on having fun in a group was strong. Clubbing, concertgoing, parties of various sorts will all definitely reemerge but probably differently.

We heard the word outdoors mentioned repeatedly. And there was no real sense of going wild, of total abandon. Their attitudes toward having fun seem to have become even more circumspect; Gen Z has a different sense of hedonism, as we will explore later on.

Travel figured prominently in an imagined future – there was a huge sense of wanderlust, of anticipating the time where travel plans hatched during lockdown could become a reality. This is a topic in itself but one we could only skim on given the time limits of our engagements.

When we touched on future shopping, we saw online-offline tensions playing out clearly. Online has it all: convenience, ubiquity, price comparisons and more. But Gen Z loves and misses real-life shopping trips. Visiting bricks-and-mortar outlets with their mates, browsing, picking things up, trying things on, checking out any new in-store experiences a store might have to offer. Secondhand stores? Bring them on.

It seems that whatever the future of e-commerce brings, there's an important role for the touchy-feely world of retail closeness and physicality for Gen Z. For brands looking to attract or recruit the next generation of digital-native consumers, that's an important consideration.

Generation togetherness

"I would be all in for a basic democracy – something like that."

A strong thread through all our conversations was a growth in the importance of what we'll call togetherness. We know from previous studies that Gen Z is strongly driven by the group – their peer group of friends. The group decides ultimately what's in, what's less cool – often more so than online influencers who can be suggestive of new trends or ideas. The "we" beats the "me."

COVID-19 seems have strengthened this feeling. We heard a lot about togetherness in many forms; diversity, inclusivity and mutual encouragement remain strongly held values.

Borders are something to be bridged – Gen Z sees itself as a global tribe – in the pursuit of global harmony. Solidarity is a must.

They're as keen as ever on helping make the world a better place. Eco issues? Still front and center – as is the desire to make societies less divided, people kinder.

The overall impression was strongly utopian – a generation seemingly aspiring to a drug-free, more sensible revival of the flower-power movement of the 1960s.

Whilst the above may sound extremely idealistic, our impression from countless projects with Gen Z is that their belief set and convictions are deep-seated. It's a mind-set that likely won't simply disappear as they enter the adult world and the workplace.

We seem to be witnessing a sort of next-gen sea change in values, not just another youth-driven bubble.

Hedonism redefined

"Protests are fun for me, you get together with friends and create something meaningful."

Changing perceptions of what it means to have fun was also a strong theme.

Despite in many ways being a remarkably adult, precocious and sometimes serious-seeming young generation, hedonism is still a top priority for them. They certainly like to see the flip side of things – including laughing at themselves, not taking life too seriously.

But their sense of fun, how they interpret it, is pretty different to that of Millennials, for example. Fun doesn't necessarily mean going wild and partying from Friday night through Monday morning.

Sure, they want to switch off and dance away the catastrophes in the world around us. They also definitely have FOMO – parties, rites of passage, the whole celebratory process of growing up. There is a strong sense of the need to catch up.

But it's not about being excessive. "Hedonism" is more about enjoying time together with friends, doing something meaningful or creative. Like making music, learning a new language – or fighting for the right cause, creating social media content or creating a private theater play.

Purpose, politics and fun are not in any way contradictory for them. Quite the opposite – they can be connected.

One of the concept scenarios we discussed was the "golden 20s." This envisaged exuberance and extravagance – driven by a need to catch up on all things missed. It didn't resonate. Participants welcomed the return of normal routines, of physical contacts being permitted again. But the idea of wild celebrations wasn't seen as realistic, nor particularly relevant.

Worth noting briefly as a coda here: fun can definitely be premium or luxury for this group. While teenagers and young adults are almost always dependent on their parents for money, there are definitely pockets of Gen Z affluence – in comparison to a generation ago.

There will be moments of celebration where the parentally financed and controlled purse strings are loosened and they treat themselves. To dinner at an extravagant restaurant with friends to celebrate, for example.

The experience is highly valued – and being a responsible Gen Z person doesn't exclude moments of self-indulgence.

The world of work — flat, fair and equal

"My parents killed themselves at work, there's no way I'm going to do the same, even if I earn less money."

When we came to talk about the world of work and their attitudes towards it, it quickly became clear how much of a sea change has happened since Millennials entered the workplace.

Again, the pandemic seems to have acted as an accelerator. Meaningful work is a key concept for Gen Z, much more than simply earning money. Money is viewed pragmatically – having enough to get by, manage financially, but not much more than that.

Their limited financial expectations from "a job" are pretty different, however, from what they expect an employer should offer. There's quite a long list.

Everyone should have a job that allows for professional and private fulfillment, time for personal development. Leisure time? Just as important as work. Overtime? Not more than is absolutely necessary. And no more meaningless jobs. They are all for a four-day week and in fact consider this a standard long overdue.

Flat structures and salaries more equally distributed across hierarchies were mentioned often. Bosses are viewed as coaches and networkers rather than decision-makers. And decision-making should be participatory and take place in committees rather than in a top-down manner driven by individuals.

Communication should be open, fair and honest – telling the truth is something Gen Z appreciates, even if it hurts.

It's all quite different from the aspirations and expectations from people entering the workplace 15-20 years ago.

And yes, Gen Z people do take their careers seriously, and financial security is important to them as well.

Quite a lot for HR leaders and business owners to ponder on! Core principles for employers should include: listening closely and being honest, responding as best and as fully as business realities allow. After all: a better world should have a better workplace.

Values and belief structures unchanged

In summary, it seems that Gen Z will emerge from the global 2020/2022 pandemic with many if not all of their underlying values and belief structures unchanged.

The urge to take action, to make things happen, will likely reemerge even more strongly.

We can expect them to be even more demanding of "better" from those in charge of the world around them. That means an ongoing eyeballing of "the powerful" – brands, companies and governments – monitoring for consistently responsible behaviors across the board.

Gen Z is quick to Google, get themselves up to speed, spot discrepancies or inconsistencies.

When it comes to Gen Z as potential employees, the workplace can anticipate a demanding generation with high expectations, as documented above.

It's an interesting moment – when determined youthful idealism meets workplace pragmatism.

To conclude on a lighter, hopefully balanced note: Gen Z might appear intimidating but they're not all deadly earnest. Yes, they're demanding but fun is still written big on their agenda. As is travel. Or having the latest, coolest sneakers. They like to laugh; after all, the world is such a serious place, you need to be able to smile.

And a lot of the rules of Gen Z engagement for packaging, say, or online advertising, still apply; the rules of great storytelling haven't changed, for example, even if content and channel expectations have modified.

Doing regular research on Gen Z's mind-set and preferences is highly recommended. This cohort is very fluid when it comes to brands and they are often reluctant to commit, preferring to keep their options open. Keeping one's finger on the pulse is hugely important and valuable.

All clear? Great. Gen Z doesn't have all the time in the world!

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••• seniors research

Updating the narrative

In spite of it all, older Americans find reasons for optimism during COVID-19

|By David Dutwin

snapshot

Research data refutes typical beliefs about life after 50, even against the backdrop of a pandemic.

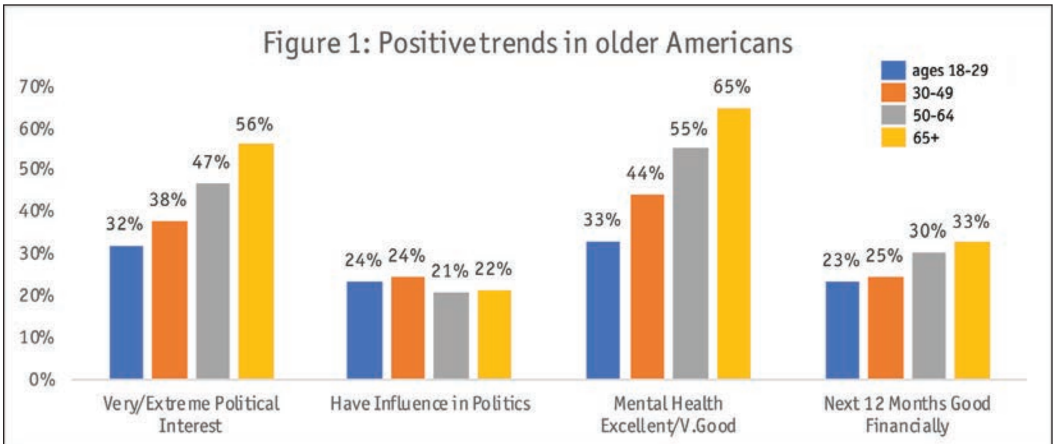
The COVID-19 pandemic has been one of the greatest health challenges in most people's lifetimes. It has put Americans under tremendous stress: Anxiety about getting the disease has been significant, especially with the more deadly early strains, particularly for anyone over age 50, and more so for those with a comorbidity. There has been economic stress too: The economy plunged, the market became more volatile and no one knew what the future would hold. Every time it seemed we had gotten past the disease, a new variant would arise.

Perhaps the worst of all has been the impact of the disease on mental health. People had to "shelter in place" for, in many cases, over a year. While the impact of concern about isolation typically focused on school-age children and their lack of in-person schooling and socializing, the strain on mental health spanned all age groups and perhaps hit older Americans just as much as anyone.

As an over-50 single dad, I became completely isolated in my home when my kids were not there. Sure, frequent Zoom calls with work colleagues and business partners offered some social contact but we all discovered that videoconferencing was just not the same as connecting face-to-face. Worse still was my 89-year-old father's situation: His assisted-living center did everything they could to "wall off" from the disease and as a result, I was unable to see him in-person for many months. He was isolated from the only family he had left and unable to even have his meals in the dining hall of the facility. He, in effect, lived in a single room for eight straight months. The mental health toll on the many such adults in similar situations in retirement communities was palpable.

All but ignored

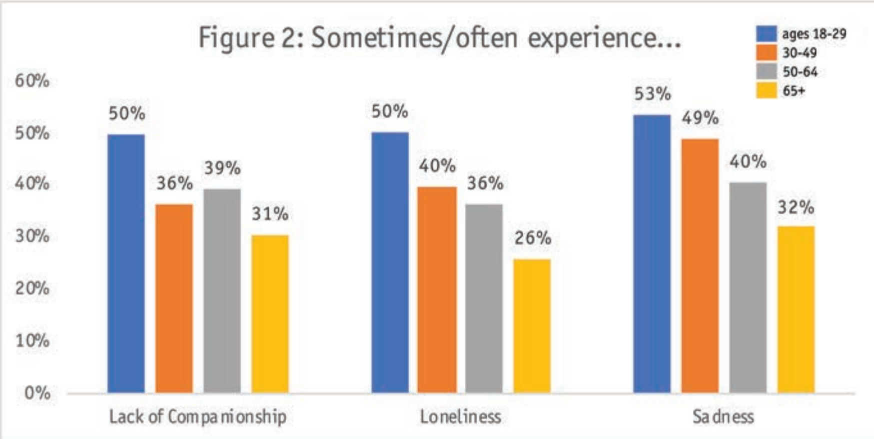
Reports and surveys on older Americans even in non-pandemic times often paint a less than rosy picture. Financially, the story of older Americans has been one of decline. Surveys have reported financial anxiety among older Americans for generations and with historically declining earning potential, marketers in the 20th century all but ignored this age cohort in pursuit of younger ones that simply spent far more than older Americans. Additionally, the common political narrative of older Americans has been that while they are more involved than younger Americans by virtue of their rate of voter registration, voting frequency and volunteering frequency, they are also, somewhat paradoxically, more skeptical, critical – pessimistic even – about politics and what the future holds. Finally, self-reported health of course declines with age and the frequency of maladies increases. These and many other declines in self-reported health and wellness are well documented.



Source: AmeriSpeak profile surveys, 2021

However, this story is not just incomplete, it has also failed to keep up with the reality of the changing times. And in response to the pandemic, the narrative is simply off base. The story of older Americans is, in fact, not one of complete financial pessimism, of low earnings and spending, or of political cynicism. Communal isolation thanks to COVID-19 has not quite produced the negative impact on older Americans as we might have expected. Rather, research findings from Foresight 50+ by AARP and NORC and NORC's AmeriSpeak Panel, both scientifically valid research panels built from random samples and in-person recruiting, combined with other data, paint a vastly different picture of Americans aged 50 and older (Figure 1).

First, Americans 50 and older, without much fanfare, recently passed a significant economic milestone: Over half of all consumer



Source: AmeriSpeak profile surveys, 2021

spending in the U.S. is now thanks to this age cohort. Moreover, persons age 65+ are now the most affluent of any age category: From 1989 to 2016, their net worth went from approximately $150,000 to $250,000. Health does indeed decline with age but not in the same way and with the same effect as it did even 25 years ago. Most persons over age 80 continue, for example, to live in their own homes, which for the vast majority have appreciated considerably in the past two decades, adding significantly to their net worth. And, combined with the fact that sometime around a decade or so from now over half of all U.S. adults will be over age 50, the purchasing power of these Americans has yet to even realize its full potential.

Second, political interest among older Americans has, if anything, increased in the past few decades, with now over half of them reporting they are very, or even extremely, interested in politics. They are now generally no more likely to claim they have no power in politics than other age groups; they in fact hold the same level of their own political self-efficacy as do younger generations, even those under age 30 who are commonly understood to be within the age of advocacy, the age of political action. Indeed, in 2018, typical of other midterm elections, persons ages 65 and older voted at nearly 70 percent the frequency of those age 18-29 (81% versus 49%). Though less pronounced, the gap in presidential elections is still nevertheless considerable.

Third, and perhaps most notable, is how older Americans have fared during the pandemic. Of course, while many, in all age categories, have struggled with mental health before and during the past few years, older Americans have stayed resilient and held onto optimism, by far more than any other age group. They leaned on friendships and family; they had the tools, the experience and history to hold steady and they took a decidedly positive view. We found that yes, while there is a linear negative trend in overall health by age group, there is actually quite the opposite trend for mental health. Levels of isolation, loneliness and sadness, as just a few examples in our data, are significantly lower among those 50 and older and especially 65 and older, when compared to younger generations (Figure 2). "We will get through this" seems to be a driving message among this age group.

Standing the test of time

Historically, the story that the data has told us of older Americans was one of failing health, loneliness and isolation and financial hardship and instability. However, our research has showed us that it is time to write a new narrative. Older Americans are both dynamic and resilient and, based on our data, are standing the test of time and circumstance better than most of us had ever thought possible. As someone just a few years into the age 50+ group, I could not agree more about the need for a shift in tone in the conversation. The trends in the data tell a different tale of how older Americans are living and, further, thriving, in today's social, political and economic landscape. Now it is time for us to make sure that reality is reflected in the way it deserves. I, and I am sure many other Americans aged 50+, will be pleased to see the change in perception.

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shopper insights

The race to keep pace

How your shopper research can evolve with a changing retail landscape

| By Carey Gervason

snapshot

Carey Gervason offers practical principles for success in purchase journey research.

Purchase journey research has many names but one goal: drive sales. To that end, we study shoppers' paths to purchase, create shopper journey maps and look for opportunities to minimize gaps in brand and category sales conversion. Success means that brands grow, retailer partnerships thrive and boost category growth and consumers benefit from a more seamless shopping experience – it's a "win-win-win" for consumers, brands and retailers.

But amid the shifting sands of today's ever-evolving retail landscape, success in purchase journey research can be hard to define. And if you don't take an intentional approach to defining your objectives it can be hard to achieve.

Over the past few years, we've had numerous conversations with organizations that are concerned about what the acceleration of digital and e-commerce means for their business. Certainly, shopper behavior has evolved and shopper paths have expanded, becoming more complex and more challenging to study. So, not only are new growth strategies and tactics required but the tools and techniques we use to study the purchase journey have evolved as well. The largest risk brands face related to purchase journey shortcomings is knee-jerk, reflexive reactions to short-term trends – like commissioning clickstream analysis because it's popular without understanding its limitations.

Consider the predictions made during the past year about the stickiness of e-commerce or, more recently, the return of in-store shopping. If we were to react myopically to each projection, we might embark on dozens of piecemeal shopper research studies that each lack a holistic view of the journey. We would then be trying to cobble together disparate, fragmented bits of data in an effort to make sense of it all. Missteps or inaction would be likely outcomes, diminishing brand equity instead of growing it, ultimately leaving gaps for sagacious competitors to seize market share.

So, to harness the wealth of shopper data appropriately and support

Figure 1

brand and sales teams in meeting their business objectives, we need an actionable framework that aligns the key inputs and outputs of purchase journey research into a winning story. Figure 1 is a framework describing three key purchase journey outputs.

There are about 50 touchpoints available for use across a shopper's entire journey, from trigger to purchase. In-store buyers of FMCGs typically have five or fewer touchpoints while tech, durables and online buyers tend to have anywhere from five to 15. Touchpoint usage will also vary by subcategory. Initially, we might conclude that our objective is simply to identify the most prevalent touchpoints used. This approach is helpful but it only gets us halfway there. Many touchpoints are not optimized for conversion (if they were, more shoppers would be purchasing at that point).

In addition to touchpoint reach, we also need to understand which touchpoints are impacting conversion and which are serving another purpose – or, perhaps, are providing little value at all. From over 20 years of purchase journey experience, we have found that 20% of touchpoints deliver 80% of the impact on sales. So, we really need to identify those 20% of touchpoints that truly matter for our brand and category sales. This is the practice of touchpoint planning.

Needs, motivations and frictions

To achieve our goal of producing sales, we need to benchmark our performance across the most impactful touchpoints to prioritize those where we are underperforming. And second, we need to uncover shoppers' needs, motivations and frictions at those moments to reveal opportunities to optimize communications in terms of both tonality and content. For high-investment categories and longer journeys, identifying purchase abandonment rates and profiling who is deciding not to buy, and why, can be another pivotal step.

As for key inputs and methods, it gets a bit trickier. There is no one perfect purchase journey methodology. In fact, effective purchase journey research will likely demand two or more carefully choreographed approaches. And while there are a multitude of shopper-journey solutions available from a multitude of research suppliers, what's important is choosing an approach with the end in mind. Does the methodological solution lend itself to achieving the key outputs previously mentioned? Does it align with your organization's business strategy?

Here are five overarching principles to support sound methodological decision making and help mitigate risk in your purchase journey investment:

1. Money is not the only currency you will spend. Perhaps the single most important decision is whether to partner with a full-service custom shopper research partner, a standardized tech platform research provider or go it alone with a fully DIY platform. Depending on which you choose (and this is, unfortunately, sometimes the choice of someone else), your team will pay in not only money but also time and energy (positive and/or negative energy).

It is critical to conduct a readiness assessment evaluating and comparing the required shopper expertise and available tools against the team's resources. Anticipate that the three types of currencies will not remain in equilibrium but rather each will fluctuate depending on the others.

For example, a recent engagement with a manufacturer of shelf-stable cookies and crackers began with the goal of synthesizing clickstream data with findings from a DIY survey. Though they had the analytical tools to link the two disparate data inputs, no one on the team had the time or expertise to identify the common unit of analysis (i.e., the bridge variable they would use as a connection point). Upon deeper investigation, it was discovered that the gaps in conversion were primarily at the moment of purchase, rather than pre-purchase, where clickstream is most informative. In addition, one of the two categories was actually losing shoppers in-store. While we were able to help this organization, it necessitated additional research that was not in scope – or in their budget.

If there comes a point where you are feeling just a bit overwhelmed due to time, resource or expertise restraints, ask for guidance. Some research providers will engage with brands at multiple levels, from full-service to consulting to training sessions.

2. Keep your focus on the goal to avoid becoming enchanted by extraneous variables. Journey map infographics and content are pored over, refined and then refined again. Before accepting a "pretty" or "comprehensive" journey map alone, ask yourself and your potential research partner how all the data contained within a journey will be distilled down into the three essential outputs in a manner that will drive business decisions.

An electronics manufacturer came to us with the goal of winning more shoppers in the digital space. It had already pursued other avenues that did not bear fruit – the results of which it had trouble understanding and was hesitant to try to explain to its internal teams. We conducted a comprehensive discovery phase, including stakeholder interviews, social listening and a review of the previous research. While the previous journey results were thorough and the stages of the journey matched the organization's view of the shopping process, specific unanswered survey questions and a handful of odd results led us to determine that the stages of the journey were not shopper-centric – in fact, they were overcomplicated. Electronics buyers did not think of the journey in a five-step fashion; in their view, they took steps to research the product and they took other steps to buy it.

3. Think about the journey holistically; don't be wooed by passive data. Strive for a holistic omnichannel approach as your primary research foundation, adding onto it as needed. A more traditional qualitative-plus-quantitative research approach is currently the only single source of shopper insights bridging the O2O connection (online-to-offline and offline-to-online). Qualitative can take various forms, including digital shop-alongs, online bulletin boards or even triad/focus groups, depending on needs. For quantitative, mobile-first surveys are prevalent but some categories may benefit from longitudinal methods to get closer to shopping activities.

Behavioral/passive data (e.g., clickstream, URL tracking, eye tracking) can be extremely valuable in illuminating the purchase journey and supporting activation efforts as a supplementary data input but be aware of its gaps. Passive data is, inherently, only a slice of the entire picture:

- Passive data coverage includes only online journey touchpoints. Offline influences like retail flyers, prior store trips, word-of-mouth and print media are excluded, even though they may be top touchpoints driving conversion.
- Ask about device coverage. Don't assume that digital behavior includes both desktop and mobile behavior, as it often does not.
- Ask about retailer coverage. Some e-commerce retailer sites block clickstream tracking, which can be a huge surprise if not anticipated upfront.
- Passive data is often sourced separately from your primary research approach. Best efforts should be made to find a linkage to be able to analyze behaviors with attitudes. Some suppliers, including Burke, use single-source sampling for clickstream data, which is a subset of primary quantitative survey respondents with opt-in digital behavior tracking enabled. This automatically provides a hard connection to the survey data. When mobile behavior is necessary, Burke uses its Geode|AI solution to fuse disparate data sources.
- Clickstream lends itself to rich insights during the pre-purchase/research stage. URL tracking and eye tracking offer deeper insights during the moment-of-purchase stage on the retailer's e-commerce site. These methodologies should not be used interchangeably.

4. If it seems too good to be true, it likely is. Buyer's remorse is real when it comes to purchase-journey work. Just as there are disruptors in your category or categories, there are disruptors in the marketing research field – many of which are tech startups with limited shopper or marketing research expertise.

- A good rule of thumb is that shopper journey work should cover the who, what, where, why, when and how of shopping in a category, wherever shoppers research and buy.
- Research methodologies tend to be specialized (e.g., quant measures, qual understands why, behavioral often dives into where and how, etc.) and you will probably need to blend multiple methods to achieve all your goals. So, ensure your research supplier has a plan in place to fuse disparate data sources, whether it be a hard or soft synthesis.
- If a supplier claims a single research methodology that solves all your issues, investigate further to ensure that there will be a clear understanding of the why behind the what.

5. Embrace partnership throughout and particularly at the bookends of the study. As a brand leader, you know your business better than anyone else. When you choose wisely, you partner with a research supplier who is an expert in shopper behavior. Better outcomes happen when we work together.

The last thing a research supplier wants to hear is, "Well, we already knew that." To ensure research results are reliable, relevant and (most importantly) actionable, judicious planning is vital. Planning should include an inventory of the current landscape, anticipation of how current tasks affect adjacent work activities and recognition that different stakeholders may be able to add incremental value to research goals and design. Even when you and your research partner are excited to dive into the study, planning is an insurance policy for success.

The electronics study mentioned earlier is an example of true partnership. Our partner shared as much as they could as soon as they could at the beginning of the study. By leveraging existing qualitative shop-alongs, we were able to design a holistic quantitative survey with an added clickstream deep-dive into digital behavior.

Anchored in this approach, we were able to provide more strategic perspective:

- We took a holistic view of the brand's impact throughout journey touchpoints and used Geode|AI along with attribution modelling to identify which were most impactful.
- Competitive benchmarks clearly established where the client was winning and losing in critical phases of the journey.
- We provided purchase abandonment metrics that shed light on who was choosing not to buy and why.
- The triangulation of qualitative data, quantitative survey data and clickstream data using Geode|AI pointed to earned media and the company's website as the top areas of opportunity.

On the back end of the study, we set aside time for an iterative results process – building, refining and improving the output together. Our client is now leveraging our recommendations in a variety of ways, including: evolving its social media strategy, because earned media was identified as a gap; optimizing the experience on its website, making it easier to shop earlier in the journey, where many consumers were lost; and developing a playbook to help retail partners optimize their online experience.

Tools and techniques will also evolve

At times, it may feel overwhelming trying to keep pace with change. Innovation in new retail formats, new technologies and more convenient buying options will certainly lead to additional shopper behavior changes that we cannot predict. However, we can take comfort in the fact that the tools and techniques we use to study shoppers will also evolve.

All that said, the goal of any purchase journey research will always remain the same: produce sales. So, regardless of changing consumer dynamics, it's important to keep that ultimate outcome in perspective. And, as you align your inputs and add dimension to your goals, hopefully the frameworks provided here will help you more effectively allocate your resources. Because while change may be a constant in retail, so is the need for intentional, actionable planning to drive brand growth. And that's where you can make a difference.

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••• shopper insights

Make them the focus

Why shoppers – not brands – should be at the center of your research

| By Devora Rogers and Rebecca Brooks

snapshot

How can we overcome marketing research "brand narcissism"? In an excerpt from their new book, the authors offer some strategies for change.

While the ways people shop have changed sharply over the past decade, many market research practices have failed to keep up. When we took a hard look at traditional research methods that once served us and our clients well, we could see that they were not working in this environment. For decades, research has been built on what we call brand narcissism, where surveys focus on the brand first rather than the people who matter most: shoppers. It's time to reinvent the way we ask people about shopping.

That's why we sat down and wrote the book "Influencing Shopper Decisions: Unleash the Power of Your Brand to Win Customers." It dives into our decades of experience in shopper research, starting with the advent of the supposed "never-going-to-catch-on" online shopping and moving through to the permanent changes the pandemic has brought to the shopping experience. Through our work with brands and projects like Google's Zero Moment of Truth (ZMOT) study we've examined how shoppers behave – and what they expect – in the digital world.

Throughout the book, we take readers on a journey through our process of developing a new kind of research methodology, something we call shopper influence. After studying the buyer journey for numerous brand categories and closely examining the so-called path to purchase, we could clearly see that shoppers are savvy, information-hungry and more confident than ever before. We've emerged into the age of shopper promiscuity, where shoppers are uninterested in brand loyalty and are instead focusing on their own needs, looking past the brand to continuously try new options to find the best fit.

Our exploration into information source usage and source influence is critical in understanding how to best resonate with target audiences who exhibit behaviors that are anything but homogeneous. In the final chapter of our book we present several strategies for change to help us take a path toward influencing shopper decisions with marketing that's based on the right kind of insights. We've included an excerpt from that chapter below.

Hopefully through all of this, our key message – that shoppers want and need more content than ever before – has stuck. Because it's no longer enough for brands to promote a logo or an identity. Now, they must be content creators and news writers engaging with influencers and empowering shoppers to evangelize on their behalf. They must powerfully activate across dozens of touchpoints. They must inform shoppers with every detail they need to feel good about their decisions to buy their brand's products and services. And, returning to one of the key findings from our Google ZMOT research: There is no linear path to purchase and every category can be a high-consideration category.

As we have demonstrated, a critical consequence of shoppers being more informed than ever before is that they are more promiscuous than ever before. When they start their decision journey, they're much more open to new brands, new experiences, new everything. And this has caused them to reevaluate all their decisions, even ones we might have called routine.

Key truths we have revealed include:

- *Shoppers are not passively waiting on you to inform them about your brand.*
- *Shoppers are "hunting" and hungry for information.*
- *Shoppers perceive much less risk in trying new brands and products than they used to.*
- *Because of the volume of information available to them, shoppers are far more thoughtful than they used to be. While they may be willing to try new brands and products, they do more research than ever before. This is especially true of Millennial and Gen Z shoppers and remote workers.*
- *Shoppers expect transparency and thorough information to help them come to a decision with confidence.*
- *Shoppers expect innovation. A brand will fail if they are not rapidly updating and innovating in their space.*

The world was changing rapidly before the COVID-19 pandemic but we're now seeing not only an acceleration of online tools but also shifts in priorities, attitudes and beliefs. These are not momentary adjustments. Shoppers are setting out on a new behavioral path that's still evolving. If brands truly want to win with the promiscuous shopper, they have to orient their entire organization around a new understanding of shopper behavior.

We must acknowledge there is no limit on the options available to shoppers and the impact this increased access to choice, innovation and information has had *on brands, retailers and shoppers' brains. This transformation has resulted in a very different kind of shopper – an entirely new generation of shoppers, actually – while brand marketing and market research is based on an outmoded purchase model. This brings us to the shock of shopper promiscuity that brands are coming to terms with. And it's long past time for those of us in the market research industry to acknowledge our role in pushing our work beyond the "norm" that results in brand narcissism.*

Let's admit the level of navel-gazing we have allowed to become standard in our research questions. Like you're dealing with an insecure, self-involved date: How did you hear about me? What do you like about me? How do I stack up against your other dates? Are you going to go on another date with me?

So many of the questions that we ask around the purchase funnel are from the brand's perspective but really don't reflect the shopper's experience. Because our research finds that almost half of all shoppers no longer go into a decision-making process with a brand in mind. They are coming in with their own needs, priorities and how they want to solve the problem that this product is solving. These two things – brand narcissism and shopper promiscuity – are inextricable forces that have created a perfect storm.

And here's our Jerry Maguire moment, our cry for a change in research: We are asking the wrong questions of a population that has fundamentally changed. The ship we've built out of traditional research cannot withstand the power of the coming storm brought on by shopper promiscuity. We are sounding the alarm on shopper promiscuity and revealing that traditional research is not helping us. The emperor has no clothes.

We close out the chapter, and the book, with next steps and strategies that apply not only to researchers and marketers but also to executives and company leaders. From feeding the information-hungry shopper and remaining adaptive to breaking free of traditional assumptions around brand loyalty, we provide a step-by-step method for change that will ultimately help your brand gain a better understanding of its shoppers.

When it comes to specific research techniques, we make recommendations based on a holistic, consumer-centered approach that employs new methodologies like agile neuroscience; applies multimodal approaches; prioritizes data integration; puts the consumer first again and again; and other specific ways to enliven and reinvigorate your research methods. For marketers, we talk about how to more deeply understand your category, specific marketing channels, your shopper, your potential new shoppers, your competitors and more.

We are acutely aware that none of this change can viably happen without leadership buy-in, so we issue a call for full support of research and marketing teams in every possible way – from funding to actually using the insights they produce in key decisions.

In short, we maintain that influencing shopper decisions in this new age requires new ways of thinking and approaches that put the shopper at the center of everything.

Devora Rogers is chief strategy officer at research consultancy Alter Agents. Rebecca Brooks is founder and CEO of Alter Agents.

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MREF Marketing Research Education Foundation

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The Marketing Research Education Foundation (MREF)'s Race Around the World for Education is the Marketing Research Industry's Largest-Ever Fundraiser.

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We came together as an industry and "walked around the world" to benefit Baal Dan's efforts to aid children displaced by the war in Ukraine.

TOP FINISHERS

Walking
1. Paula Michaels, *Fuel + The Focus Room,* 315.5 miles
2. Felix Tunon, *Schlesinger Group,* 284 miles
3. Haroon Mir, *Ipsos,* 274 miles

Running
1. Anshuman Saha, *PureSpectrum,* 325.3 miles
2. Mark Parry, *Zappi,* 302.6 miles
3. Stacey Lucerini, *Schlesinger Group,* 282.4 miles

Biking
1. Haroon Mir, *Ipsos,* 965.4 miles
2. Tushar Dhamapurkar, *Global Survey,* 953.2 miles
3. Cheryl Muldoon, *Schlesinger Group,* 862.4 miles

Other (Swim, Skate, Etc.)
1. Steven Zawada, *PureSpectrum,* 163.8 miles
2. Mark Bishop, *Multilingual Connections,* 156.5 miles
3. Paula Michaels, *Fuel + The Focus Room,* 127.5 miles

OUR MISSION

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

MREF Marketing Research Education Foundation

MRGivesBack.org

Thanks to the generosity of sponsors and participants, MREF will gift $132,298 to Baal Dan Charities (www.baaldan.com) to support the needs of children impacted by the war in Ukraine, particularly orphans. Founded in 2005, Baal Dan Charities USA is a US 501c3 public charity that helps vulnerable children in developing countries by providing small grants to grassroots organizations such as orphanages, schools and care facilities. The charity funds and supports basic needs, such as the provision of food, education and supplies and small-scale construction (e.g., toilets and handpumps).

In 2022, Baal Dan will be developing programs to support the education needs and welfare of orphans and children impacted by the war in Ukraine. With a small and efficient team of volunteers, Baal Dan is able to ensure that they can mobilize quickly, to help those who need it most efficiently and directly with virtually no administrative costs. Since 2006, the charity has helped over 10,000 children in 12 developing countries, directly providing grants to grassroots organizations such as orphanages, schools and centers that help vulnerable children including orphans, children with special needs, street children, victims of abuse or violence, refugees and children living in extreme poverty.

To learn more about Baal Dan's life-saving and empowering work to help children in need visit **www.baaldan.com.**

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"Strategically carving out time and budget to participate in community impact events is integral to our company culture and employee experience. Our teams recognize that even the smallest gesture can have a tangible impact on making a difference in people's lives in our global nation. Giving back through the MREF does good and feels good, which helps create a perpetual loop of greater industry purpose and individual happiness. Getting some extra steps in does not hurt either!"

– Steve Schlesinger, CEO, *Schlesinger Group*

"At Ipsos, we believe in applying our time, talents and resources to benefit our global communities in which we live and work. Our heart aches for our 70 colleagues and many of Ipsos' clients who call Kiev home. When given this opportunity, Ipsos employees from Geneva to San Diego, Toronto to Seoul, were proud to walk, run and bike with other professionals in support of Ukraine. I am especially proud that Ipsos and the MREF can join with researchers everywhere in doing what is necessary and possible with the virtual race for Ukraine's most vulnerable children."

– Susan Waltman, Global President, *Ipsos*

"This event allows us to internally lock arms and show up united for a great cause as one big company. It also allows us to do something really special with the other companies in our sector and show up powerfully as an industry. When we get a chance to do something like the Race Around the World for Education, it magnifies the industry and gives all of us a collective sense that the world can be a better place when we all work together."

– Tim Urmston, Founder and CEO, *SEEK Company*

"One of the five core values at Shapiro+Raj is commitment. Commitment to each other, to our clients and to our community. Our commitment to community means giving back, providing support and trying to make an impact to help those in need. While life for the Ukrainian people will never be the same, any act of kindness, any help we can provide – no matter how big or small – has the potential to make their lives a little less hard, a little less stressful and filled with a lot more hope, particularly for the refugee children of Ukraine."

– Zain Raj, Chairman and CEO, *Shapiro+Raj*

"Vulnerable children might get overlooked even in less turbulent times and it's essential we don't leave anyone behind in this unfortunate situation. By bringing awareness to the MREF's Race Around the World for Education, we can make a life-changing difference to so many. I am immensely proud of the people at Forsta and the wider research industry for going to extra mile to help and support children displaced by the war."

– Kyle Ferguson, CEO, *Forsta*

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••• ux research

Designing a good experience

How to work with stakeholders in a UX research project

| By Kay Corry Aubrey

snapshot

A veteran UX researcher shares her tips for contending with the differing needs of internal team members.

If you are a qualitative researcher who wants to get into user experience (UX) research, you're in luck! You can apply the same well-honed skills you use to understand a participant's unique point of view to working with your user experience project stakeholders.

I've worked in user experience with product development teams for over 30 years, first as an employee and, for the past 20 years, as a consultant. I'd like to share some tips I've learned along the way that have helped me succeed.

UX stakeholders are technical and focused on creating a product. In a typical UX project, the stakeholders you deal with include engineers, product managers, UX designers and quality assurance, as well as senior managers and C-level executives. This diversity presents significant challenges. Each one of your stakeholders has different skills, contexts and pressures. And these stakeholders may not even understand one another and their competing agendas and pressures. And oh, by the way, many of them will have a pretty hazy idea of what you do.

Here are just a few of the different agendas I've encountered:

- Engineers who push back when your research reveals they've been working under false assumptions about the end user – and this new information requires a change in design, involving a lot of unplanned work and changes to the release schedule.
- The chief technology officer whose baby you are usability-testing might have the urge to jump up and show the participant "the right way" to perform the task. (Make sure the door to the study room locks from the inside.)
- Product managers who care about usability and customer fit. The UX research results will send them back to the drawing board, causing a ripple effect throughout the organization.

It can be traumatic for stakeholders to watch end users struggle with a product, especially if they have a lot riding on it and have put a lot of time and energy into developing it. On the practical side, revamping a product plan (especially late in the game) often has a domino effect that impacts people's reputations, maybe their jobs and the company's bottom line. In these situations, I've trained myself to not take stakeholders' emotional reactions personally but rather see them as a window into their understanding and what matters most to them about this project overall. This is an emotional as well as an intellectual process so sometimes the best thing to do is to give stakeholders time and space to absorb and apply the insights and issues the research is revealing.

Deliverables change

Another unique aspect of UX research is how your deliverables (and often the people you work with) change depending on where you are in the product development cycle. These cycles can last several months or more. There are two cycles/phases you need to know about: formative and summative.

Formative. The early and, I think, most fun portion of a UX research project is called formative research. The formative phase mostly uses qualitative methods such as observational studies, co-creation, in-home studies and focus groups. Your mission is to help your team develop an accurate understanding of the key end users and their needs, their goals and tasks and the context in which they are using the product. Your research helps the team develop the right product for the intended audience.

Formative UX research often uses rough prototypes as the stimulus for gathering feedback and the rougher the better because you want to get the end user's gut reaction to concepts and designs. You work closely with product management and UX design in this phase, as well as engineering, to gain an understanding of the underlying technology so the concept is implementable.

Summative. Once the product concept and design become established, the UX researcher's work transitions to the summative phase. The goal of this phase is to produce a polished product design, most often by running iterative usability studies with participants who match the target end users. Development teams move fast so to keep up with them, you are often using an agile approach to your work, running sessions with just three to four participants at a time. Aside from usability testing, the methods used in the summative phase include eye-tracking, A/B testing, beta testing and other detailed and numerically-oriented approaches. During the summative phase, the UX researcher works with progressively more detailed prototypes to the point where the prototype's user interface looks like the final product. This means they are working more closely with engineering, UX design, product management and quality assurance, as well as stakeholders involved in the rollout, such as customer success and account managers.

Not feel totally integrated

Over time, companies finally see the critical impact of UX research on product success. Still, due to organizational politics, a UX researcher might not feel totally integrated into the team; they might not be invited to meetings that matter, given a spot on the schedule or given the right resources to do the research.

Why the cold shoulder? As I mentioned, sometimes the insights you deliver shake up the status quo, challenge powerful people's basic assumptions or reignite old disagreements. Or maybe the team skipped the formative phase, so you are uncovering reasons for going back to the drawing board to start over. Although you are only the messenger, any unexpected insights about the users that you uncover often create unexpected work, delivery delays and even a ground-up change in plans. When this happens, the impact radiates from the development team to the executive and company-wide level, which can lead to bad things.

Other reasons for ambivalence about UX research are turf battles and fuzzy roles (Who

Affinity diagramming

Affinity diagramming is a wonderful and simple tool for involving stakeholders and helping them reach consensus on insights and issues. UX researchers leverage affinity diagramming especially for usability studies. At the beginning of each testing session they hand observers a stack of blank sticky notes that are all of the same color so they can match observations to a participant. They instruct folks to quickly write one observation per sticky note using as few words as possible. The UX researcher collects all the sticky notes at the end of the session and reviews them to extract findings. They display the sticky notes harvested from the sessions on a wall that allows teammates to review key learnings, as seen by their colleagues.

At the end of the project, the UX researcher reserves a large conference room, lays out all the sticky notes on the walls, and invites the team to a meeting where they "walk the walls," reading the notes and grouping them by notes they feel belong together (e.g., by issue or theme). Anyone in the group can rearrange the notes to their liking. The team creates labels to identify each grouping (which can also be overwritten by another person).

At a certain point all the sticky notes will find a home in one of the labelled groups. During this meeting or in a follow-up meeting, the UX researcher leads the team through the groupings where they explore the issues, prioritize them and develop solutions. Affinity diagramming can be done in-person as well as virtually through a tool such as MURAL or Miro.

owns the end user? How is UX research different from product management or customer experience? The customer belongs to us, not UX!). Finally, resistance to the UX research function is sometimes due to a lack of understanding of the UX researcher's role and the value this person brings to the project.

One helpful exercise is to determine where the organization fits on a UX maturity model. One of the best-known maturity models is an eight-point scale by Jakob Nielsen that goes from "hostility towards usability" to "user-driven corporation." Organizations at the bottom rung of the maturity model typically have no formal UX program in place. Others on the team may have taken on the coveted (and creative) role of product design and they don't want to give it up. They may run sporadic user studies and feel this is enough and sometimes it is, in situations where the company is very successful because it produces great technology and has a strong sales force. They just don't see the need for UX and outside feedback and ideas.

When I started out in UX (when it was called "usability" and "UI design") in the early 1990s, most of the organizations I worked in fell into the "hostility" camp. When working with companies still at this phase, you feel like you have no power. You find that: others are making decisions that overshadow and dismiss inputs you provide from your realm of expertise as a UX researcher; you are working with limited resources; you can't get anything done. Some UX researchers thrive in these environments because they have specialized skills (like visual design or an engineering mind-set) and are able to find a solid niche within the work group because they relate well to the people around them.

Working inside organizations that fall on the other end of the spectrum – a user-driven corporation – is like heaven. The UX role is well-established and you are integral to product design decision-making. While people may not agree with everything you say, they pay close attention, seek to understand it, give their opinion and respect yours. You have the people, budget and time to do great work. The organization supports UX and makes room for it because they see its value, especially in this age of digital transformation.

Somewhere in the middle

Most of the companies I work with fall somewhere in the middle of the scale but the situation is still manageable. For me, most of the work I do as a consultant takes place in corporate environments, which present their own dysfunctions because they are hierarchical, unstable and often very rigid. The headwinds I encounter tend to come from office politics vs. stakeholders not understanding or resisting my input.

Yes, there are challenges, but here are the five essential strategies to work successfully with stakeholders in a UX research project.

1. Seek allies

Create close relationships with teammates who value what you do and who apply research learnings directly to their work. Focus on forming trusting relationships with peers and with stakeholders at high levels, even if they are not actively participating in the work. High-level support needs to be visible because it reinforces the integral nature of your contribution, which makes it easier for you to be effective. Ask your client to identify the key stakeholders and interview these stakeholders early in your project, before developing research materials.

2. Show stakeholders their impact

Show stakeholders how they are influencing the research design and process. Make the connection very concrete where they see how you are asking questions and presenting usability tasks that directly relate to their concerns. For example, create an "observer" version of your usability task list where you call out the intent behind each task and the stakeholder(s) who care about

that aspect of the design. Meet with your stakeholders at the beginning of the project to learn their areas of interest and usability concerns as it relates to the product. As you and your team do the work, check in with your stakeholders to learn if their needs are being met by the research.

3. Involve them in the actual research

People learn about end users through direct observation, so always invite stakeholders to observe your sessions. If you know and trust the stakeholder(s), it's fine to ask two or three of them to accompany you on an in-home visit or other research activity; however, make sure to explain your role clearly and tactfully as the moderator and theirs as the notetaker, cameraperson, etc. To accommodate a larger group, set up a back room with piped-in video from the session. Ask a colleague who understands UX research to manage the group and help folks process what they are seeing.

4. Let them analyze the results

Debrief continuously with stakeholders as you move through your study. This gives you a chance to really understand their perspective and the impact the findings have on their area of responsibility. In a usability study debrief, compare notes on how well participants completed tasks, what went well, where they struggled. At the end of a study, sponsor a "round-up" workshop where the team reviews all the findings, decides on issues, solutions and priorities. The affinity diagramming technique (sidebar) is a very effective team decision-making tool for these types of workshops.

5. Meet everyone's needs with your reporting

Your report needs to be succinct and actionable. It can be multimedia but its primary purpose is as a record of team decision-making with a punch-list of action steps. The report should also contain no surprises because throughout the whole research process you have worked closely with stakeholders to identify the issues, prioritized them and developed solutions. Layer the information, separating summarized from detailed findings because some stakeholders (e.g., C-level executives and product managers) care most about the summary while others (engineers and UI designers) need to see the details.

Do whatever you can

Throughout it all, though, remember to keep it human! Your success hinges on how people feel about working with you and their recognition of the value you have brought them. A big part of your job as a UX researcher is to do whatever you can to gain your team's attention, positive regard and willingness to work with you. The relationships you form with your stakeholders are as important as the quality of the insights you deliver.

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●●● the business of research

Don't get ahead of yourself

Use contextual intelligence to set the stage for research success

| By Susan Fader

snapshot

In our haste to make our research agile, we're overlooking important pre-project work, Susan Fader argues.

To begin designing or even thinking about starting any research journey, you need to make baseline assumptions. But with the current emphasis on agile timelines – which means getting into and out of the field as quickly as possible – little to no time is spent on evaluating if the assumptions used in prior rounds are the right fit for the research at hand. In many cases, no evaluation is done and past assumptions are just taken as givens.

The trouble is, if you start your research relying on the faulty baseline assumptions, you can end up going down the wrong research path and, even worse, unknowingly end up drawing inaccurate conclusions – no matter how much data you are able to collect during fielding.

For example, until about 500 years ago, astronomers believed that the planets and the sun revolved around Earth. All their observations, data-gathering and analysis of planetary rotation paths and movements of stars were based on a very incorrect baseline assumption. Under their Earth-centric view, the planetary movements seemed to follow erratic rotation patterns. But even so, since they felt that their baseline assumption was the right starting point for gathering their data, they continued to amass information and draw incorrect conclusions.

Then Nicolaus Copernicus recontextualized how astronomers should be analyzing planetary rotation. He did this by changing the baseline assumption and revolutionized the science of astronomy by postulating that all the planets – including the Earth – revolved around the sun. This belief provided observational data that mapped out a radically different view of planetary rotation and also made much more sense.

The world of market research can also learn from the Copernicus example. Right now the focus, in market research, is almost exclusively on "agile" through incorporating technological innovations that can accelerate the executional/fielding and analytical stages. In many

the contextual stage, I like to think of market research as having a similar structure to running a marathon (Figure 1). Hardly anyone who is running a marathon would just show up to the starting line without spending prior time reviewing and reevaluating their past assumptions/possible running strategies. Just because a marathon strategy may have worked before doesn't mean the same strategy will work for the next one, because many key elements that can impact how they should run could be different, e.g., the course route and elevation, the weather, the runner's current fitness and who the competition is.

When you incorporate the contextual stage into your research project, you are using what I call contextual intelligence, which helps make sure the research is designed and executed using accurate assumptions, giving you the right starting point and context to frame the research challenge and begin your exploration.

Just like running a race, the contextual intelligence stage of research also has three main components:

What: the objectives to be laid out

Who: the demographics of who to talk to

Where: the areas the research should cover and how the conversation should begin/flow

Art: Barbara Mizik | Concept: Susan Fader

cases, researchers don't even realize that they are speeding through the important contextual stage of research by quickly reverting to and accepting "givens" – namely, using previous research findings, existing/historical demographic segments and accompanying stereotypes as the foundation for baseline assumptions.

To reinforce the importance and need to focus more attention on

What

Without taking contextual intelligence and the totality of the overall context into ac-


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DISCOVERING WHY

count, you risk behaving like the blind men in the famous parable about their first encounter with an elephant. They are each only allowed to touch a specific small part of the elephant and thus come to very different and wildly inaccurate descriptions of what the animal actually looks like. Contextual intelligence is the flashlight that illuminates the whole elephant.

Context is also the prism we use to make judgement calls and decisions and it is important to recognize that context is not static. But rarely do we see contextual change in real time. Change may appear to be happening slowly and therefore not always be obvious, which is even more reason why we should be on the lookout.

A good example of the value of contextualizing the research objective comes from the world of hotel guest satisfaction studies. A hotel was puzzled by numerous complaints of slow elevators, even though the speeds of its elevators were comparable to industry standard. Adding an elevator bank would be expensive and time-consuming and require taking multiple rooms out of commission. Before going down that route, hotel management correctly decided to explore why guests were assuming the elevators were slow. (Note that this was before cellphones were common.) For guests the issue was not slow elevators but rather "being bored because I had nothing to do while I'm waiting." So the correct starting point was "how to address the issue of guests being bored while waiting" versus "how to fix the problem of slow elevators."

Ever wonder why hotel elevator banks are generally surrounded by a wall of mirrors? Well, nearly everyone likes looking at themselves and, when doing so, they are rarely bored! Take the time at the conceptual stage and make sure that you have the correct research "problem" in focus before you go into the field.

Who

As researchers, we like to think we are curious and open-minded. However, if we don't understand the complex context of emotions, perceptions and experiences that shape people's thoughts, actions and decisions then it's quite possible we may be making inaccurate baseline assumptions.

Companies' categorizations generally default along historical standard guidelines – in place since the 1960s – focusing on traditional demographics (age, gender, income, education, relationship status, kids, sexual orientation, etc.) with overlays of product/service product and usage. Sometimes attitudinal questions are added but they tend to be more fluff than codebreaking, e.g., "I am comfortable talking with people I don't know."

We need to recognize that categorizations/segmentations/demographic groupings are generally designed to fit potential consumers into structures that meet business-unit needs; they're not necessarily how the consumers see themselves.

When it comes to who we recruit for research we need to incorporate what I call the cognitive demographics component of contextual intelligence, which is about recognizing how people self-define versus putting them into demographic categories predefined by marketers or researchers.

The importance of contextualizing identity prior to designing a research study – more specifically, how you define identity – is imperative to elevate engagement and participation, especially in qualitative research. It is one of the many codes that make up that "neuro-combination lock" on our individual mind-safes. Without taking into account how respondents self-define, the research could be wrongly interpreted.

Let's look at a study I did with moms about products they might purchase for their family. The traditional demographic approach would identify the mothers as being the same, while cognitive demographics would show they are different.

For example, two recruited moms are the same age, have the same number of children of the same genders and ages, have same household income, the same profession, go to the same church and in fact are neighbors. Does that mean they should be grouped as demographically similar? Actually no. The two moms perceive their roles as moms very differently. During recruiting, when I asked them what their "mom motto" was, I got very different answers. One mom's motto was a laid-back "I go with the flow," while the other's was a more helicopter-mom-like "I will do anything for my kids."

Without taking into account how they self-define and perceive their worlds, these moms' individual feedback during the research could be wrongly interpreted. From a cognitive demographic perspective, they see themselves as having very different views on motherhood and therefore will make purchase decisions differently.

In addition, how companies have historically asked demographic screening and categorization questions may no longer be appropriate when it comes to aspects like race and gender that were previously rigidly defined. A 2022 study, How to Ask Race and Ethnicity in a More Inclusive and Sensitive Way, underwritten by 11 different, diverse research companies and overseen by the Insights Association, explored the appropriate ways to ask what is generally the demographic laundry list.

One of the important takeaways was to consider if you even need to pose all of the typical demographic questions. If they're not relevant to the study, just drop them.

Race is a contentious topic in the U.S. and, as the study showed, asking people to put themselves into preselected categories can be off-putting, especially when over 10% of all Americans now consider themselves multiracial (2020 U.S. Census Bureau) and thus have difficulty choosing only one racial designation.

The Insights Association study also showed that trying to be all-inclusive by providing an abundance of racial and gender options can also have negative ramifications. Check it out for further demographic screening guideline insights.

Where

Too often the amount of material the research study needs to cover overflows the discussion or questionnaire time frame and there is strong temptation to say, "We already know the answers from past research so we don't need to include any probing around this in this research study." But just because you – the researcher/company – know something from past research doesn't mean it is top of mind to consumers or still relevant or as important as you may think. Even your most frequent users may not have your product or service top of mind.

I have found that adding a pre-work/homework assignment that I call a self-diagnostic ethnography can be extremely beneficial in generating in-depth and thoughtful conversations during the actual research discussion. A self-diagnostic ethnography is the anthesis of a data collection exercise, which tends to be positioned as, "We don't have time to ask in the discussion so let's just have them answer the questions as a homework assignment." Its purpose is to create a situation where the research participant can self-observe their behavior in their natural environment before they come to the research discussion. It allows them to consciously observe and analyze actions that are normally automatic and bring that newfound awareness to the research discussion.

If it is a qualitative research study, I like to think of the overall structure of the discussion as a long hallway with many doors. Each door is numbered and behind each door is a specific area of questions. A typical qualitative study involves the moderator metaphorically taking the person's hand and exploring each door in a prescribed order. First the questions behind door number one, then the questions behind door number two, etc.

However, if you allow the person to initially lead the discussion they might go to door nine first, then door four, then to door three or even bring you to a door you didn't know existed but is integral to their worldview. The journey they take, what they emphasize, what they leave out, etc., can not only be very informative but generate game-changing insights. More importantly this open-ended storytelling structure, where the participant – instead of the moderator/interviewer – determines how they share their story about the research topic you are exploring, will generate more relevant and deeper insights than a traditional question/answer-structured guide. A bonus is that you can often cover more material because a lot of information is provided in unaided storytelling form, rather than requiring the moderator to ask a laundry list of questions.

An example of this was for a study I did on fabric softener new product ideas, where participants, all heavy users of the brand in question, completed a self-diagnostic ethnography exercise while doing laundry the week before the research study discussion. They were asked to record the three things they liked best and three things they liked least about doing laundry. Then, to start the research discussion, I asked them each to share their story of laundry likes and dislikes. Note that I specifically did not ask them to focus on the topic of the research – the fabric softener – because fabric softener resides in the world of laundry and I wanted to see how fabric softener would or would not come up organically in their laundry stories.

Surprisingly to the client, who thought they already knew what the consumers would say and so therefore didn't need to hear them talk about how they do laundry, a number of loyal and heavy users of the company's fabric softener didn't mention fabric softener at all in their stories. It turned out that, for these consumers, adding fabric softener was such an automatic behavior that it was not really top of mind when they thought about doing laundry. This was an extremely important learning that impacted how the consumers perceived the new fabric softener product ideas and how new fabric softener products should be positioned to them and one we would not have gotten if we hadn't taken the step of starting the discussion on laundry versus fabric softeners.

So, if you are doing a research study and your assumption is that your subject/product is top of mind with respondents because they are heavy users, your concept/new product discussion will be starting from the wrong place. In addition, you will aggravate the research context problem if you start the ice-breaker/warm-up with specific topic questions such as, "Tell me why you use fabric softener." But if you design your research project so that each consumer's personal worldview of laundry – whether it does or does not contain fabric softener – is their personal starting line, then your research design will probably lead you to different conclusions of the viability and true interest in the new product ideas than if you started with a discussion focused on fabric softener.

Add another stage

Much of the current focus in marketing research is on the executional and analytical stages of a project. Even many of the recent technological innovations that have made our work more efficient – from dashboards to AI-driven data analysis tools – have focused on the post-field stages. I think we need to add another stage, a conceptual one that incorporates a contextual intelligence approach as a starting point to make sure we are really evaluating our baseline assumptions – before we go rushing ahead. The quest for agility is certainly worthwhile but by taking time early in the process, we can make sure we'll be happy once we reach the finish line.

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••• the business of research

Adding insight to foresight

The value of human input when you're looking ahead

| By Matt Carmichael

snapshot

Matt Carmichael on why you need foresight in your research – and research in your foresight.

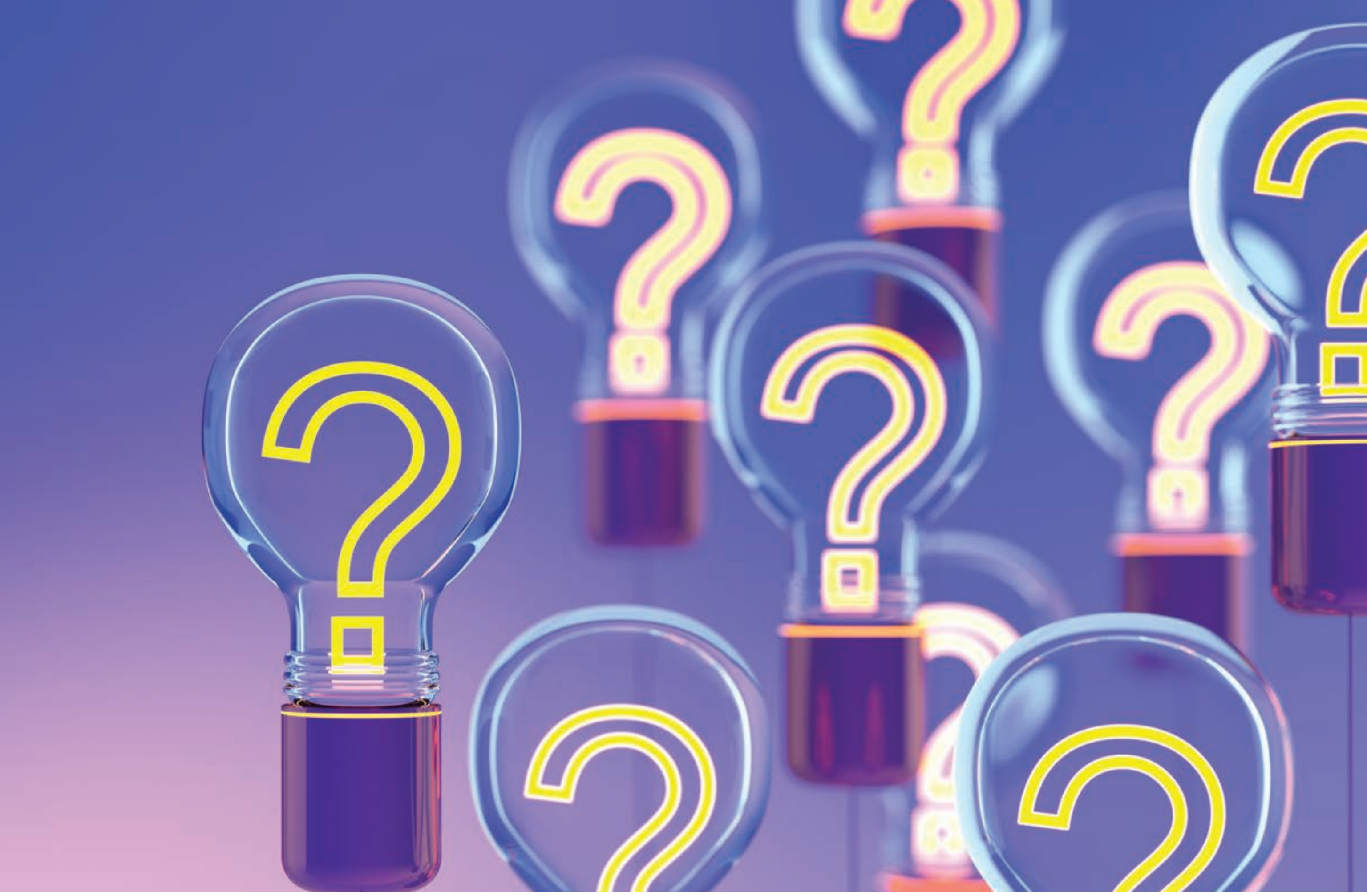
Futurists love to talk about the past. And they love to talk about plausible futures. This article will do both of those things. It will focus more than you might anticipate on horses. But in the end, you should be convinced of two things. One, that in your research, you should think about the future and two, when you think about the future, you need to consider one really key thing that is often left out of conversations about foresight: You need to think about people, their opinions and their values.

Let's start with some history. There was a piece floating around LinkedIn recently about the weird gauge of train tracks in the U.S. It's an unusual width: 4 feet, 8.5 inches. It's great for tying your typical 5-foot-4 damsel to if your goal is to put her in distress but otherwise, it's odd. Because we have a lot to cover, we'll skip to the beginning of the story: The track size goes all the way back to the width of Roman chariots, which in turn is based on the width of two ancient horse butts.

So, trains today, and so many things they carry, including industrial parts and components, are also size-constrained by millennia-old horse butts. Crazy, huh?

Confession time: That thing about horse butts is a myth – although one that is maybe 80 years old. But it sounds totally plausible. As mentioned, futurists love to talk about plausible futures but this is an interesting example of a plausible history. The endurance of this pre-social-media-meme myth is interesting because it tells us something about the way you should think about the future: Things don't change much. Macro forces drive change. And they do so over long swaths of time that are often slow to unfold.

The point of all this history is that we need to remember as researchers that the future is built on the present, the present is built on



the past and the past is built on people. And, well, horses.

Hint at change

When Ipsos thinks about the future, we look at three main things. First, we consider those tectonic macro forces that unfold over time – things like climate change and demographic shifts. It doesn't take a futurist to know those forces exist but it's important to understand how they shape – and are shaped by – other forces. So we also consider signals we see today that hint at change. These could be a patent filing or some new innovation. A news clipping might be a signal.

Futurists don't often know exactly what a signal portends but our Spidey sense tells us it hints at *something*.

Finally, at the heart of it all, is the humans. How are people, markets and society shifting and how are those shifts impacting and impacted by the signals and macro forces? The output of this consideration can either be trends or foresight work. But if your trend work isn't considering the humans, it's missing a major component.

Keeping humans at the center has several key benefits. One, it means you're focused on insight and impacts, not just on new technology, etc. But more importantly, shifts in human opinions and values are something you can measure over time.

Before getting into the value of that process, let's dispel another myth. That means it's time to talk about horses again. Henry Ford is oft-quoted as saying that if he'd asked people what they wanted (i.e., done some research), they would have said they wanted faster horses. Turns out that's a myth too. According to the Harvard Business Review, Ford never actually said that but it's still a great quote. Someone said it. And it's often used to show that opinion doesn't necessarily matter in the innovation space because sometimes people can't imagine what's coming. They can't anticipate or react to something that doesn't exist.

While that part's true, people can imagine that they want speed and convenience. Behavioral science tells us that for a change to be accepted it will have to solve a human need. Either a faster horse or an automobile would solve those needs. Since people make up quotes for Henry Ford, here's perhaps a useful edit: "I helped popularize the automobile because I understood not what people want but what people value." (Clearly he didn't say that either.)

When we think about the future, it's easy to focus on what will be different. But we have to avoid getting too fixated on change. Because the big things don't really change all that much. Sure, opinions and attitudes change, but our values tend to be pretty consistent.

Humans are creatures of habit and routine. It's not that we don't like new and shiny things. We do. We really do. It's that those new and shiny things, again, have to fill a need. But inventions need to also hit at the right time, which involves a host of factors, including convenience, that humans value, as well as utility (another thing we value) and affordability (yet another thing humans care a lot about). Finally, they need also to work.

So if things don't change too much, we don't even need foresight do we? Au contraire, mon frère. We need foresight to plan for the certain uncertainty. Cuz stuff happens.

Imagine the territory

How so? Well, when you're thinking about the future of a topic, try to think of all of the things that could factor into it. Imagine the territory that surrounds the topic. The map, if you will. For instance, the future of sports isn't just about sports leagues and broadcast rights and the changes to the college landscape as athletes can leverage their names, images and likenesses for financial gain. The future of sports is also about climate change.

What if a generation of kids spends more time indoors instead of playing football or futball because it's 120 outside all summer? Will they be sports fans in the same way? What if people get used to the new volumetric video broadcasts of sports like the NBA is already trying out – showing essentially avatars of the real players really playing the game? Will that lead us or accelerate us to "sports" with virtual athletes that we watch in the metaverse?

Or take automated vehicles. They are not just a faster horse but a smarter horse. The future of automated vehicles, for example, is partially about the work engineers and programmers are doing to make the idea technically feasible and the tech is getting there. But it's also ultimately driven by the belief that people want them, will feel safe being driven by them and won't feel as if their freedom or privacy is threatened by Big Tech. That's a tension.

Will people buy automated cars? Will they give up a perception of freedom, which marketers have for generations had us believe is directly caused by the ability to control your movements by taking hold of the steering wheel? Will lawmakers agree to fund the infrastructure needed, and at what cost financially, and with what as a trade-off in a fixed budget? Today Ipsos data says 42% of Americans have a positive view of self-driving cars but 47% have a negative view. What if that shifts? What if the car manufacturers and the independent organizations that monitor and test vehicle safety convince us that autonomous driving is extraordinarily safer (it is) than if we all drive ourselves?

There is a plausible scenario where autonomous driving becomes the standard, at least in major cities and areas with the infrastructure to support it. There's another plausible scenario where the tech evolves but people don't buy it or won't fund the infrastructure needed to make the cars function. Chicago is a deeply blue city in an otherwise red state. Will the legislators in Springfield and downstate Illinois vote to fund something they see as benefiting mostly just those Tesla-driving elites in Chicago? You've met America, what do you think?

Innovations that are so needed to solve problems like climate change or the labor shortage in long-haul trucking can be held up because…we're not looking at the future.

Of course things could shape the future that have nothing to do with opinion. Volcanoes can erupt. Meteors can crash into the Earth. Yet, even then, the survivors have to decide what comes next.

As researchers we can watch the opinion data shift. We can view those shifts as waypoints, showing us which of many potential futures we are steering toward. We can do the qual and the quant work and layer in the social listening and the behavioral science. We can measure the tension shift as well as we try to right the course or accelerate on the path toward our desired outcome. As opinions shift or are swayed one way or another, those movements act as vectors that will steer us toward one plausible future or another.

The secret sauce

When you think about it this way, humans, and their opinions, values and behaviors, are the secret sauce of foresight.

How do you keep humans at the center? Not surprisingly the answer is "research"! But how do you actually do it? A major part of it comes in the design phase. It's important to capture underlying values as well as opinions and behaviors. You can do this through qual and quant, through surveys and ethnography, through active and passive social listening and online communities. The goal is to understand the human needs and the ways you can fulfil them.

The tensions people feel on topics like these won't entirely drive the future but they will drive how we respond to it. They are based on opinion. And opinion is sometime intractable, especially in the short term, but is ultimately malleable. Same with behaviors. If they become habits, they can be very hard to change.

Opinions and behavior change can be accelerated or arrested by disruptions like, say, a global pandemic speeding up the demand curve for delivery or the threat of war helping NATO find renewed purpose and strength.

Tensions can strengthen or relax or release, depending on how opinion shifts.

Values, on the other hand, are more bedrock. They don't tend to change over time too much on their own.

Author Phil Tetlock has written that, "Every policy is a prediction." We make policies with the assumption that they will shape the future in a desired way. The same could be said of all the choices we make in our daily lives. We eat certain foods because of (or despite) a belief that they will help us live longer, healthier lives. We invest and save based on all sorts of factors we assume about our future within the future. We choose our friends, our spouses, where we live and our careers based on what feels correct now and what it means for our personal tomorrow.

Therefore, we are all futurists to the degree that our opinions impact our personal and the collective future.

As we think about the future we need to know that it won't just happen; we have to make it happen.

Many don't get that. But many do and people are right this moment working to shape the future and get others to act in ways that they think will benefit their desired future. That's true to vastly different extents with everything from marketing to journalism, disinformation to campaign speeches.

To the extent that communication is about manipulating events, it starts by shaping opinion. People still have to believe in something in order to act a certain way.

One typical output of foresight work is scenarios of plausible futures. Once you've developed several of these, think about how your product will look in those futures. Think about the future jobs to be done. Then think about a research roadmap to get you there – again, keeping humans at the heart. Part of this is about concepts and innovation and making sure those innovations solve for a human need. But part of it is going to be beyond that in terms of the user experience, the marketing and creative and ultimately the customer experience with these future products in these future scenarios. And finally, think about how to measure potential shifts over time as an ongoing system of checks and balances as the world shifts around you as well.

Understanding the relationship

If you haven't guessed by now, this use of tension is also a play on words. Opinions upon which we act are often in tension. The actions we take based on those opinions are done so with intention. Imagining potential futures requires understanding the relationship between the tensions in our beliefs and the intentions of our actions.

And further, if we are to aim for a future we desire personally or for our company or our community, we must do so with intention. We must shift the opinions of those who are in tension with our opinion. Because the people who have other or even opposite opinions are working with intent toward their desired future.

The future is in tension.

The future is intention.

All of this discussion to this point has been about why you need to keep humans at the heart of your foresight. Whether you're working with a foresight consultant or spinning up your own internal team, if humans (and therefore ongoing, intentional research) aren't part of the plan, you're not going to know where you are or where you're headed.

But why do you need to keep foresight in the center of your research, too? Chuck Klosterman wrote a book you should read. It's called, "But What if We're Wrong?" The premise is to look at the present as if it were the past. Imagine, for example, it's 100 years or 500 years in the future. Think about it in marketing research terms: What's something that in five or 10 years you're going to wish you had trending data on?

That's a powerful idea and one that was the original premise of What the Future, the monthly foresight magazine from Ipsos. Since the first issue in 2017, the magazine has featured Q&As with the smartest people on any given topic: food, housing, transportation, gender, beauty, vice and more. They would be asked that question about aspirational trending data and then Ipsos would actually field those questions and set a baseline.

So years before the pandemic caused us all to want everything brought to us, Chris Kempczinski, the now-president and CEO of McDonald's, was talking about ghost kitchens and delivery. The concept of ghost kitchens was so far off that Ipsos had to add a lot of text to the question stem explaining it. This was long before YouTuber MrBeast spun up a burger chain in 300 markets simultaneously with no physical locations.

And before we were required to shelter in place, Ipsos was talking with IKEA's Mary Lunghi about smart homes and what she called the "fluidity of living," in which rooms in our homes would be yoga studios, schools, offices, dining rooms all at the same time or just by moving a bit of furniture around.

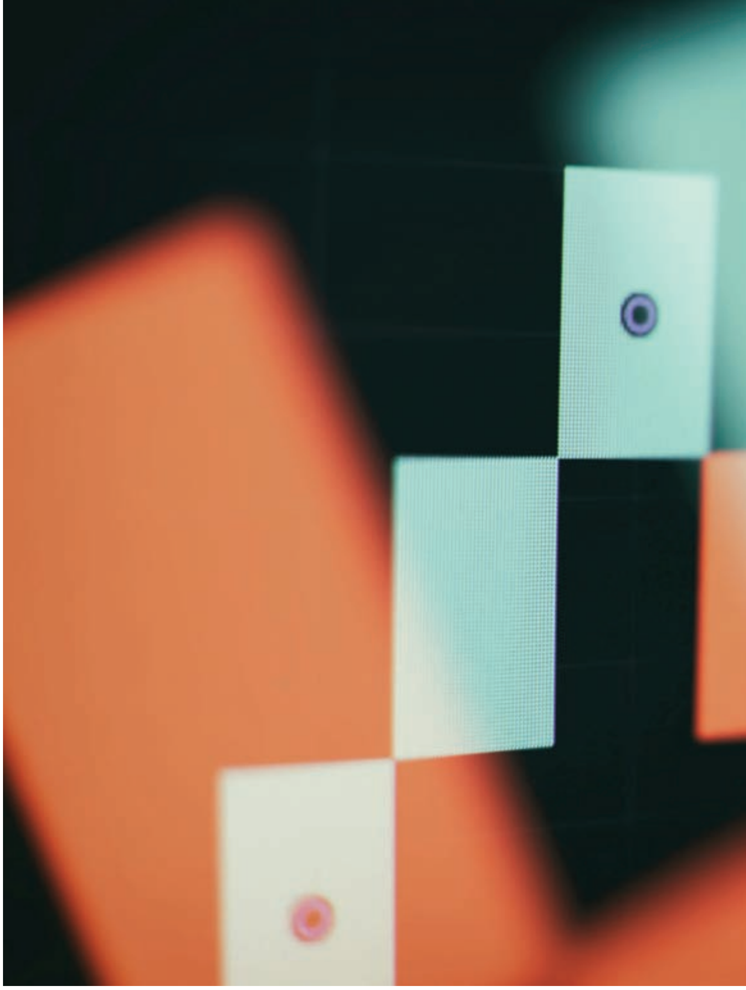
This all is why you need foresight in your research. It gets to that topic of human needs and how to meet them in the future. A standard interview with McDonald's or IKEA would have been asking about the now or maybe the next quarter or two. But by thinking about the future in the interview, the stories explored more interesting topics for readers and clients. We did so in the context of the needs for convenience and flexibility – and how that might look down the road.

Solve those problems

We need to think about the future. The world is full of big challenges – a climate emergency, threats of world war, pandemics, inequality, inequity, injustice. People, consumers, customers – whatever you want to call the humans – are looking at us as leaders and brands to help solve those problems, especially as the governments around us seem to be failing at the task.

Humans get that. And they want help. We need to think about the future. Many already do, to some degree. Innovation cycles for some products are measured in years and decades. But most of us don't think about the future. At least not in any systematic way, not in a way that reaches the level of foresight. And we need to. To solve the big problems and also to solve more immediate challenges.

However you do it – in-house, with a consultant, with a Magic 8 Ball (no, please don't do that) – keep marketing research at the heart of your foresight. And keep foresight in mind when you're planning your research. Because at the end of the day, or at least at the end this article, it all comes down to this one simple point, which also would make a great Henry Ford quote, had he said anything like it: When you imagine tomorrow, you ask better questions today.



••• tracking studies

Let's get tracking

A how-to guide for market, brand and advertising tracking studies

| By Elliot Savitzky

snapshot

Parts 2 and 3 look at key metrics and controlling the variables.

In Part 1 of this article last issue, we looked at the reasons for conducting tracking research and the types commonly used. This time around, in Parts 2 and 3 we will cover key metrics, how to control variables, how to analyze data and, of greatest importance, how to effectively report the findings of any analysis.

In the past, telephone survey research was the prevalent method of conducting any tracking study. As cell phones became ubiquitous, respondents were no longer willing to engage in 50-minute surveys. Call screening, homes with no landlines and the arrival of caller ID further restricted response levels from individuals that were primarily targeted during and after dinner time.

Conducting surveys online became more efficient and led to better representation of targeted markets. What didn't change, for a long time, was the assumption that you could simply apply the same techniques that were used on telephone surveys to online surveys. Surveys remained too long, rating scales were not updated to reflect the online experience, items within rating questions stayed way too wordy and the way we collected and analyzed open-end textual data did not change.

As a result, practices that had been used during the days of telephone interviewing became even more prevalent with online surveys. Respondents were not qualified to take part in the specific survey, they sped through the survey, they straightlined their answers and did some research of their own before answering open-ended questions in order to fit the screening criteria.

There are only a finite number of potential respondents that are empaneled by sample providers, all providing incentives to complete surveys. The problem was exacerbated when the market research industry realized that many of the same respondents were being used repeatedly by all the different sample providers. Sample companies and research

agencies have been working hard to reduce fraud by placing tests within the analyses of survey-generated data to identify and eliminate cheaters and to reduce the number of multiple respondents that originate from the same IP addresses. While cooperation rates continue declining, the quality of the data obtained has increased. Unfortunately, with fewer quality samples available, particularly for B2B research, costs per respondent have increased.

So the current line of thinking mandates a number of dramatic changes to the surveys themselves, including:

- limiting survey duration to no more than 20 minutes if possible;
- trimming attribute lists to no more than 12;
- reducing the number of brands rated at any one time;
- making survey mobile-ready (limit the number of attributes per screen; shorten rating scales; fit the screen to the device);
- eliminate redundancy (no reason to ask stated importance if it can be derived);
- reduce the number of dependent variables (overall satisfaction, likelihood to recommend, consideration, share of wallet, constant sum, etc. – pick one!);
- eliminate irrelevant questions;
- eliminate questions you already know the answers to;
- avoid "questionnaire by committee" syndrome.

Base design on the objectives

What are the key metrics for an effective tracking study? You can't design any questionnaire unless you base its design on the objectives of the research. For an advertising tracking study, you need to go back to the strategy that was created for the development of new advertising (the copy strategy) as well as the marketing and media plans. What is the copy trying to accomplish? Is it directed at new users or prospects or is it designed to reassure your loyal user base? Think hard about what you are trying to accomplish and design the survey accordingly. Figure 1 shows a way to conceptualize the types of questions you would want to include in the survey as you view the marketing funnel overall.

That said, there is a standard set of questions that should be included in any tracking study and asked of everyone who passes the screening criteria. These questions should relate to the following:

Figure 1

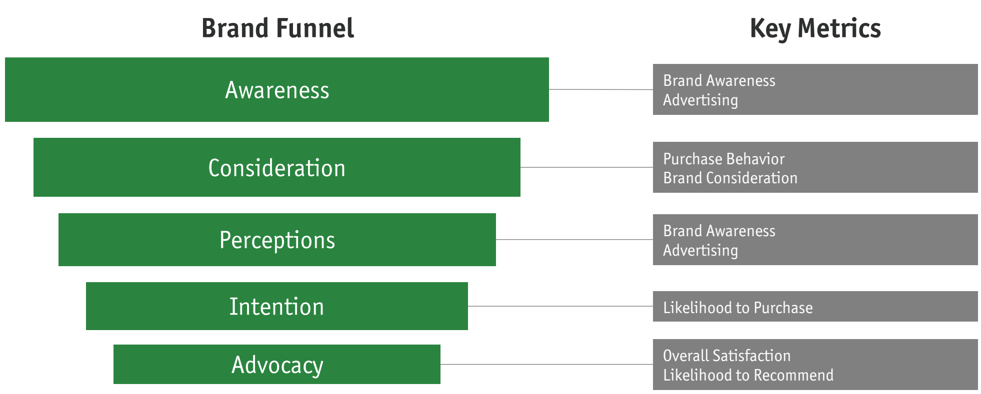
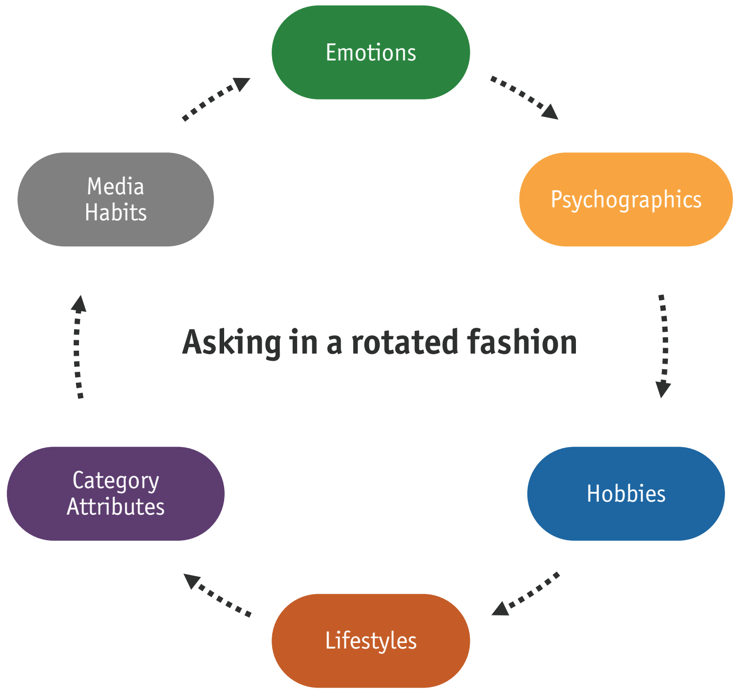


Figure 2



- brand or advertising awareness
- familiarity (knowing the brand name alone is not enough to know the brand)
- brand experience – current portfolio of products used or purchased in the past (e.g., currently, most often, past year, past three months)
- consideration – what brands are in contention for selection?
- brand ratings – limit the scale, limit the number of brands rated and limit the number of factors they are rated on (respondents should be aware of and familiar with the brands that are being rated)
- loyalty metric – e.g., satisfaction, likelihood to recommend, share of wallet

All other question areas, except for the demographic profiling section, can be covered in a rotated fashion so that not everyone is asked every question. This will help to limit the length of each questionnaire. The answers to these question areas are typically lower priority and a smaller sample for analysis is often adequate. As an example (Figure 2), one-third of the sample could be asked two of these modules each, so that all modules are asked among the same number of respondents: emotional assessment; category attitudes; lifestyles; psychographics; hobbies; media habits. So, one-third emotions and psychographics, one-third hobbies and lifestyles and one-third category attitudes and media habits, etc.

Constructing a tracking study

When constructing a tracking study, the first step is deciding where you are going to source your sample of those potentially in your target market. Although some panel companies screen their panelists for preexisting or former brand usage or certain characteristics or behaviors, this almost never aligns with what you're trying to accomplish. And even if there are pre-screened panelists, there is no guarantee the data is current.

It's important to work with a trusted panel partner who can not only complete the initial project but also be available for future ones. This avoids the introduction of an unwanted variable.

Samples of tracking studies are usually stratified using a few key characteristics that are relevant for the market(s) being investigated:

- Region – Is it national or regional or specific test and control markets?
- Age – Do we need to survey everyone 18+ in age or are there defined targets like Gen Z and/or Millennials which will require stricter definitions?
- Gender – Male and/or female? 50/50 split or skewed in any fashion? Remember that today's gender roles are not as rigidly defined as male or female now that non-binary is an option.
- Income – For many categories, household income is a key criterion for a potential market target which may require a more affluent sample.

Once completed, these strata are often weighted to how they are represented in the larger universe and often balanced to previous waves of tracking to be "more representative" and to minimize bias between waves.

As an example, when you design a tracking program, you might specify that out of a sample of 1,000 completed interviews, you will require the sample to contain males and females, aged 18-54 and to have household incomes above $50,000.

In order to manage the number of completed interviews and to maintain a representative sample, you are likely to require that the interviews have quotas enforced such that:

- Half are among males and half among females.
- The age groups are divided such that there are equal numbers of

completed interviews in each of the following subgroups: 18-24; 25-34; 35-44; 45-54.
- Similarly, household income might be divided into the following groups: $50,000-$59,000; $60,000-$69,000; $70,000-$79,000; $80,000-$89,000; $90,000-$99,000; $100,000+
- Geography is usually divided by time zone or the four Census regions and the nine divisions within them.

The point in going through this level of rigor is to make sure you can compare your sampled population to the known Census data and to weight your sample back to those known data points to ensure representation of the U.S. population that are between the ages of 18 and 54. As each of these points of stratification are taken into account, the weighting scheme becomes more complex as they are all interrelated.

So if you were to conduct a tracking study among people aged 18-54, you can be certain that whatever data you collect can be projected onto the larger population, e.g., among adults up to 54 years of age, 23% of the population in the U.S. are aware of the Acme brand of car polish.

Timing is key

One of the most important variables you need to control is timing of the research. Of course, if you are conducting a continuous study, then consistency is the only concern.

If research is being used to trend from previous waves, it is critical to replicate the timing of the previous reading if possible. If the post-wave was conducted as soon as the media spending stopped then you need to continue with that trend. Again, this is not really an issue for continuous tracking but important for point-in-time tracking programs.

If this is not a continuous tracking program, you need to decide how long you intend the post wave to continue. Usually, you want to allow for a lead-lag effect to take place, which means you don't want to complete the cycle of interviewing too soon. However, how long you want it to continue can be difficult to assess, which highlights an additional benefit of continuous tracking.

Skew the outcome

Changes to any tracking study can skew the outcome, making it ineffective to compare results to those of previous waves. Whenever we see major changes in the trend of data from a tracking study that has been either been changed in its design or taken over from another company, the immediate questions are: What changed? Did the market register a change or did the results change because the study changed?

Potentially variable factors can include any or all of the following: the company managing the research; the method of execution; the sample source; changing the sample; changing the sampling geography; changes to the study's timing; changes in survey flow or the addition/deletion of key question areas; changes to sample composition; programming errors; data tabulation errors; changing the brands being assessed; changing key characteristics of an attribute list; changing key evaluative criteria and/or rating scales.

Assuming you want to maintain historical trends where possible, the following is the approach we would take to minimize the variables that could potentially impact those trends:

- Utilize the same sample source/panel provider.
- Maintain as much consistency between the previous survey as possible, particularly the key metrics and the order in which they were obtained.
- Maintain sampling geography.
- Keep the sample composition consistent.
- Maintain survey frequency wherever possible.

All or even most of the above list may not be totally possible to achieve. However, you can maintain consistency by conducting a bridge wave, which is a method of comparing the impact of variables by conducting a tracking study while simultaneously using two different survey vehicles and then comparing the results. Comparing historical trends between the two versions can help determine how any of the variables that changed may have impacted any trends. By understanding the correlation between the two versions and the historical trends, you can develop models for calibrating the data going forward.

Dependent on the objectives

The processes of analyzing marketing-related data and reporting any insights are intertwined with the design of the research and the creation of the survey, all of which are highly dependent on the objectives of the research. What are you trying to accomplish by conducting a tracking program? To measure the effectiveness of the ad campaign after launch or is it more to assess brand health and to identify threats and opportunities? Maybe it is to read the impact of a heavy-up spending plan?

None of the work that needs to be done can be divorced from tying everything back to the objectives. How you organize the data into logical time frames for evaluation and how you weight the sample and balance it to previous waves of data is all contingent on the objectives of the program.

How do you start the process? Go back to the objectives of the research. Let's assume you are conducting a continuous tracking program to assess in-market ad effectiveness. What does "ad effectiveness" actually mean? Assuming there was appropriate pretesting conducted on the advertising executions that successfully achieved its objectives based on the copy strategy, you would be hoping to support learning that would suggest that your in-market advertising was both memorable and persuasive.

And what about the media plan? Is the ad budget sufficient to break through the clutter of competitive activity to make sure your message is even heard? How do you know it is enough? Have you compared the media plan to competitors' spending? One of the problems we typically run into is that competitive spending data isn't available. Further, there is no guarantee that the media spending plan that your ad agency creates will actually be executed as intended. It can take months to obtain in-market spending levels, so you are essentially assuming that the media plan was met and hold-

ing your breath that you have spent enough to break through the clutter of competitive spending.

How much do you need to spend to be heard and how much spending is enough before you start to see signs of ad wearout? Wearout is a relative term. One version defines it as the point where the mix of creative, media placement and spending stops achieving a campaign's communications objectives and generating a response or consumer interest. The first exposure to a commercial/ad is the most effective. Repeated exposures ultimately lead to diminishing returns. Advertisers need to understand how exposure frequency influences consumer behavior.

In previous work we conducted in the early 2000s we often referred to internal research that found you needed to spend somewhere in the area of 700-1,000 targeted rating points in order for a single ad to run its course before it needed to be replaced with a pool-out.

Think about the time frame for analysis in combination with the time frame of your tracking. Unless you are conducting a continuous tracking program, you may not be in a position to organize your results by a time frame that is consistent with your media plan to be able to see the impact of any potential wearout until it is too late.

This is also why you need to overlay the spending levels along with your trended data so you can observe the relationship between the pattern of spending and its impact on key metrics like awareness, persuasion and imagery. Brand perceptions or imagery, however, do take longer to deteriorate as they tend to follow a lead-lag pattern of decay.

All of this trended data can help you to build forecasting models so that you can predict, within a certain level of certainty, how spending levels are likely to impact key metrics like awareness. And, if you can obtain in-market performance from the client, you can validate your tracking metrics as indicators of market performance. Imagine the scenario where you can link pretesting metrics, survey tracking data, digital tracking data, spending levels and in-market trial, repeat and share to create a holistic view of pre-market, in-market and post-advertising spending market performance.

The above scenario is uncommon, so a typical analysis is a key driver analysis where dependent variables like brand ratings are correlated with any number of dependent variables like satisfaction, most-often usage, repeat, recommend, etc. Identifying which of the many brand attributes are driving positive attitudes and hopefully behaviors can help refine the copy strategy going forward.

Other analyses that prove helpful are perceptual maps that visually display the relationship between brands and the images that define them. Overlaying the key driver analysis can identify important areas that are either not being delivered on or are weaknesses for your brand.

Overall, the key to an impactful report is to think about it as telling a story rather than reporting the facts. There are few things in research that are more ineffective than a 100-page tracking report that lists all the data in excruciating detail.

Rather, go back to the objectives and determine what is important to report and what is secondary. Create the "red thread" that weaves its way through the report, telling the story of what the team needs to know about its brand and the market in which it competes.

Learn further

There are so many areas to consider when planning, executing, analyzing and reporting a tracking study. While we have covered several of them here, we invite you to challenge us with your needs for implementing a program and learn further with us how to make the process more effective.

Elliot Savitzky is senior vice president at TRC Market Research. He can be reached at esavitzky@trcmarketresearch.com.

••• special advertising section

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Matt Gaffney, CEO

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the high-quality data they need to confidently make strategic decisions about their products and services.

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https://gobranded.com/

Eleven Market Research, LLC

Founded 2021 | 6 employees
Brandon Johnson, CEO

ElevenMR is a hybrid data collection and research company specializing in quantitative research. Our team of research professionals has over 25 years of experience conducting online surveys with access to over 70 online panels. When your audiences are more difficult, our Custom-Dialed Phone Methodology (interviewer administered with shared screen capability) is perfect. We offer full-service project management including programming, greater feasibility, competitive pricing and innovative sample plans, worldwide! Some of our specialty audiences include: consumer, B2B, execs and C-level, $2B+, DMs, risk and fraud, IT, financial (AUM of 50M+), pros, luxury, unacculturated Hispanics, ethnic, youth, patients (cancer, hemophilia, cystic fibrosis), health care, hospital admins, payors, insurance, etc. E-mail us at BIDS@elevenmr.com!

Phone 1-972-349-1138
www.elevenmr.com

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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https://www.fieldwork.com/market-research-services/

Full Circle Research

Founded 2013 | 20 employees
Adam Weinstein & Nate Lynch, Co-CEOs

Named the 2021 Panel Company of the Year by The Marketing Research and Insight Excellence Awards (powered by Quirk's) and a staple on Inc. 5000's Fastest-Growing Companies (2017, 2019, 2020, 2021), Full Circle leads the industry in data quality. The only U.S.-based, online consumer sample provider certified to ISO 26362, now certified to ISO 20252, and the promoter of #QUALITYFORALL, Full Circle's award-winning survey experience HoNoR (Holistic Next-Level Research)® marries advanced tech, flexible community strategies and industry-leading quality controls to deliver immediate access to proven-purest data. Full Circle's foresight, agility and innovations are a direct result of a uniquely consultative approach, delivered by diverse industry veterans.

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Mayank Bhanushali, Founder and Managing Director

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www.globalsurvey.gs

GMO Research, Inc.

Founded 2002 | 178 employees
Shinichi Hosokawa, CEO
Christa Arite, US Director
Mariana Dobre, EU Director

GMO Research offers an online audience engagement platform that allows access to a multi-country online panel network, the Cloud Panel. The Cloud Panel currently consists of over 46 million online consumer panellists across 16 APAC countries and more than 45 partner countries. At GMO Research, we pride ourselves on providing you the best-quality service ranging from full-service, project management, translations and data processing to DIY services. Pre-profiled attributes are also available on request. Our offices are located in the APAC, U.S. and E.U. region and we cater our services globally. Reach out to us to know more.

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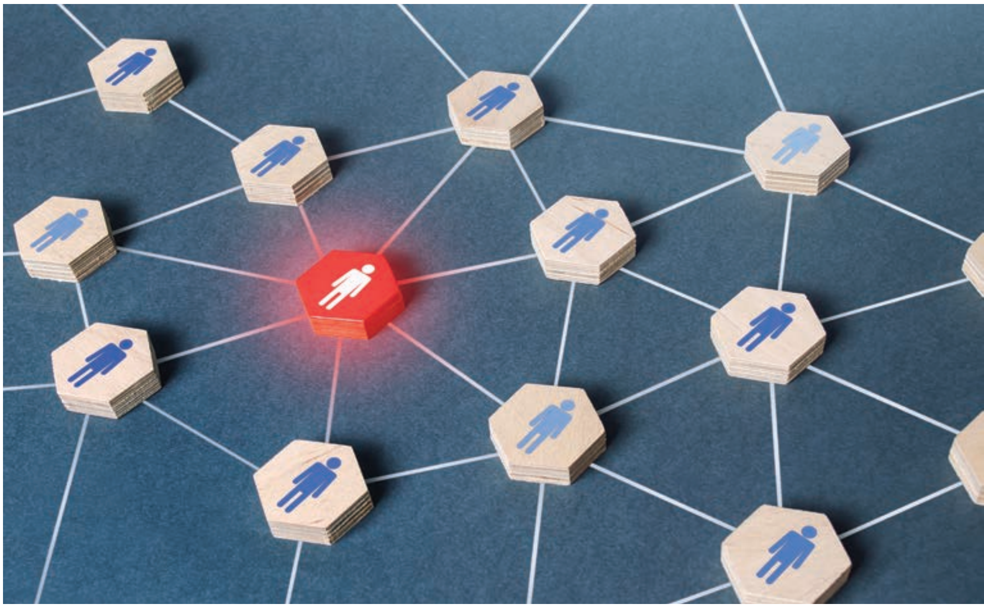

Harmon Research

Founded: 2009 | Employees: 127
Joey Harmon, President and Founder

For over 12 years, top insight companies have turned to Harmon Research for high-quality data collection. We offer research services for global consultancies across a broad range of industries. We take great pride in our ability to collect accurate, high-quality data that helps our clients make the best decisions for their business. Harmon Research's strength lies in our skill and service – our team of experienced researchers produce swift and cost-effective results using our partner and our own proprietary panels, and our dedicated account management team is always available to answer questions and sharpen the scope of our research. We use cutting-edge technology to manage our studies, including our DataDefense program, which conducts a line-by-line review of our data to ensure the insights we deliver are accurate and actionable.

Phone 1-714-881-2590
www.harmonresearch.com

InnovateMR

Founded 2014 | 170+ employees
Lisa Wilding-Brown, CEO

InnovateMR is a fiercely independent sampling and ResTech company that delivers faster answers from business and consumer audiences utilizing technologies to support agile research. InnovateMR connects organizations with targeted audiences around the world and develops forward-thinking products to support informed, data-driven strategies and identify growth opportunities. The InnovateMR team pioneered the online sampling space with hundreds of proprietary niche panels. With a highly consultative approach, the team specializes in high-touch services and delivering hard-to-reach audiences including B2B, health care, IHUTs and specialty consumer. With unparalleled and award-winning data quality, InnovateMR remains a sampling leader in the market research industry.

Phone 1-888-229-6664
https://www.innovatemr.com

Kantar Profiles

Founded 1996, 600+ employees globally
Caroline Frankum, Global CEO

Kantar Profiles is a market-leading data company and home to the world's largest audience network. Our unique API-driven ecosystem of 150m+ compliant panelists span 130 markets and includes consumers, health care professionals, niche audiences and non-survey-based data connections – accessible for precise targeting and enhanced insights. By pairing our vast network and data sources with tech-enabled research solutions, we deliver unrivalled access to quality panel and first-party data with speed and scale. Our clients name us the most trusted online panel provider in the industry, and we don't take that for granted. Consistently providing quality-assured, essential data to our clients is our purpose.

866-471-1399
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L&E Research

Founded 1984 | 250 employees
Brett Watkins, CEO

L&E Research's panel is what leading brands use when quality, validated research participants are needed. With over 1.25 million consumers and patients nationwide and with over 135 data points tracked, L&E's panel was built for qualitative research, with the vast majority of participants being ID-validated, enabling us to do high-quality quantitative research as well. We also utilize a host of technology solutions to identify and track cheaters, repeaters and other fraudulent individuals. It's why the leading brands use us to help them unlock powerful insights: quality panel, innovative technology and extreme client service. Come see why L&E is 99% client recommended!

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Founded 2008
Mitch Henderson, co-CEO

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https://www.myclearopinionpanel.com/

OvationMR

Founded 2017 | 20+ Employees
Jim Whaley, CEO

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Paradigm Sample

Founded 2009 - 110 Employees
Adam Jolley, EVP + General Manager Americas

Founded in 2009, Paradigm has established itself as a leader in service and quality across the market research industry. Paradigm prides itself on building proprietary technology solutions that support full-scale global projects, advanced analytics and the highest-quality sample – all the while saving you time and money. The Paradigm global team brings together decades of experience to ensure your project's success and instill confidence with all that we do. More than just sample, we can also support all your global project needs.

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http://www.paradigmsample.com

Quest Mindshare

Founded 2003 | 140 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 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 our project management team can superbly tackle your projects anywhere in the world. Let Quest know what your hard to find audience is (from ITDMs, financial DMs, web developers, moms with babies, music ratings and everything in between) and the team of market research experts and professionals will either offer support through the diverse panel assets or recommend ways to achieve your target.

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

Rep Data

Founded 2020 | 38 Employees
Patrick Stokes, CEO

Rep Data provides full-service data collection solutions for market researchers, helping expedite data collection for primary quantitative research studies, with a hyper-focus on data quality and consistent execution. Our mission is to be a reliable, reputable data collection partner for market research agencies, management consultancies, Fortune 500 corporations, advertising agencies, brand strategy consultancies, universities, communications agencies, public relations firms and more. Our unbiased sample sourcing and our acclaimed custom recruitment methodology helps reach quotas even for niche, nuanced audiences and delivers representative, diverse sample crowdsourced from multiple, reputable suppliers. We prioritize data quality across the project lifecycle with a layered approach to fraud mitigation and project management.

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http://www.repdata.com

Schlesinger Group

Founded 1966 | 1400 employees
Ted Pulsifer, EVP, Enterprise Solutions

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Symmetric, A Decision Analyst Company

Founded 2016 | 150+ employees
Jason Thomas, President

Symmetric owns and operates American Consumer Opinion®, a worldwide online panel that reaches over 7 million consumers in 200-plus countries, spanning North America, Latin America, Europe and Asia. Consumers can sign up to become members in one of 11 languages and complete demographic profiles are maintained for each household. Symmetric also operates five B2B worldwide online panels: Physicians Advisory Council®, Medical Advisory Board®, Executive Advisory Board®, Contractor Advisory Board® and Technology Advisory Board®. Our online panels are carefully balanced, continually refreshed and systematically cleaned – non-responders, speedsters and cheaters are continually purged. Additional services include programming, hosting, online communities, tabulation, coding and IHUT mailing. Symmetric provides sample for quantitative and qualitative research and online and offline projects. In addition to providing sample, our services include IHUTs, taste tests, mystery shopping, simulated shopping labs, car clinics, online/in-person focus groups and webcam/in-person interviews.

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

Toluna

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

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https://www.tolunacorporate.com

CALENDAR OF EVENTS

••• can't-miss activities

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 https://www.thequirksevent.com/new-york-2022/.

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 https://www.insightsassociation.org/Events/Event-Info/sessionaltcd/IDEAForum

Merlien Institute will hold MRMW Europe 2022 on **September 14-15** in **Berlin**. Visit eu.mrmw.net.

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

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 https://www.thequirksevent.com/virtual-global-2022/.

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.

The Insights Association will hold the Corporate Researchers Conference (CRC) on **October 26-28** at a location to be announced. Visit http://www.marketingresearch.org/conference/ia-corporate-researchers-conference-ia-crc.

Quirk's Media will host The Marketing Research and Insight Excellence Awards on **November 7** as a virtual awards ceremony. Visit www.quirksawards.com.

Informa Connect will hold The Market Research Event (TMRE) 2022 on **November 14-16** in **San Antonio**. Visit informaconnect.com/tmre.

Quirk's Media will host Wisdom Wednesday on **November 16**. Visit www.quirks.com/events/wisdom-wednesday-webinars-november-16-20222022.

Insights Association will hold CONVERGE on **December 6-7** at a location to be announced. Visit https://www.insightsassociation.org/Events/Event-Info/sessionaltcd/2022Converge.

Quirk's Media will host Wisdom Wednesday on **December 7**. Visit www.quirks.com/events/wisdom-wednesday-webinars-december-7-20222022.

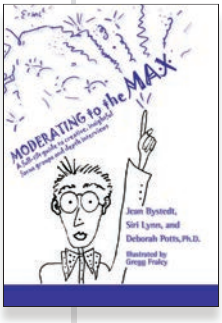
The 2023 Quirk's Event – Chicago will be held on **April 3-4, 2023**, at the Sheraton Grand in **Chicago**. Visit www.thequirksevent.com.

The 2023 Quirk's Event – London will be held on **May 2-3, 2023**, at the InterContinental London O2 in **London**. Visit www.thequirksevent.com.

Event details as of May 24, 2022. Please see websites for more details.

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

ESSENTIAL READING FOR RESEARCH PROFESSIONALS



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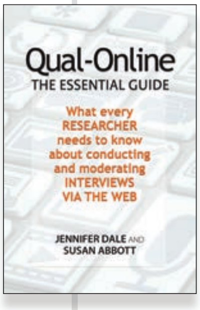

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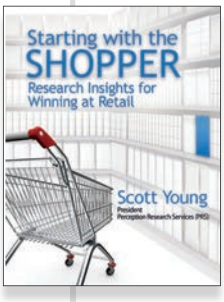

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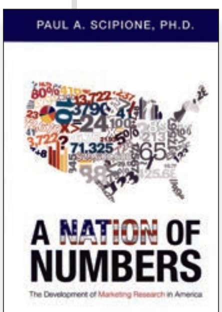

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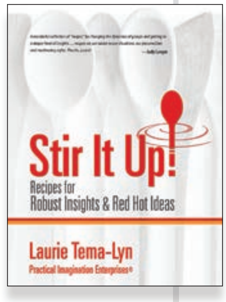

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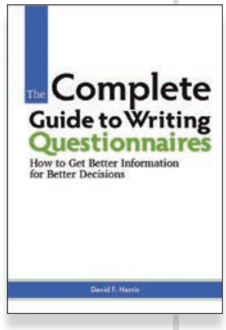

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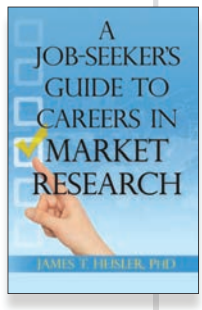

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10 minutes with...

Heidi Carrión
Senior Scientist – Products Research, Consumer Foods R&D
The J.M. Smucker Co.

"I think there's no better way to understand your products and brands than sitting at a kitchen table and letting your consumer guide the journey."

What led you to a career in research and insights?

I've jumped back and forth between product development and consumer research in different industries, including fragrance, candles, adhesives, insulation, baby products and now peanut butter and jelly with The J.M. Smucker Co. With my previous company, I began using consumer research techniques, like CLT's and bulletin boards, to answer questions in R&D. We answered very tactical questions like, "Does it matter to contractors if it's easier to tear this tape?" and "How often are they teeth-tearing versus hand-tearing?" and evaluated some new product prototypes with general contractors who are discriminating about the tapes they buy. I also took my R&D team into homes to talk to and observe consumers firsthand. At the time, it felt unique to be using consumer research methods so deeply in R&D, and it was a bit eye-opening for my R&D partners to participate in primary research like this.

I've now learned that this is truly a discipline! Targeted consumer research teams are often embedded in R&D at consumer product companies, including Smucker. My team specializes in research to inform product development and manufacturing, linking consumer experience to ways we measure different attributes, both physical and sensory properties. Most people know consumer research through more of a marketing and advertising lens, but it's also very useful deep in product development to continue keeping the consumer at the forefront of every decision.

Do you have any tips for researchers looking to remove information or data silos within their company?

Smucker has communities of practice (CoP) to help drive knowledge sharing across our different business units. We typically meet formally once a quarter, but we have an active virtual network for sharing practices, vendors and other information. Typically, I wouldn't interact with my counterpart in pet food, but with this CoP, I've learned about different approaches to research and have even applied a cat food methodology to peanut butter.

What is your favorite part about conducting in-home research?

I love the true connection – even if only for one hour – that comes with in-home interviewing! I think there's no better way to understand your products and brands than sitting at a kitchen table and letting your consumer guide the journey.

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BACKPACK challenge

Did you know:

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* National Center for Educational Statistics (NCES), March 2021