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For marketing research and insights professionals

THE TRIALS AND TRIBULATIONS OF IMPLEMENTING AI TECHNOLOGY

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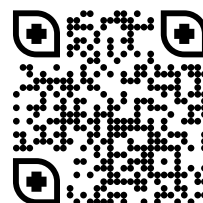
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Face to face research is an essential piece of the insights puzzle. By conducting research in person, you gain added context from body language, a more fluid group dynamic and added security and privacy measures. The right research environment for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

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

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

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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

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Quirk's Virtual returns with sessions on DIY research and more

On September 25, Quirk's Virtual returns with a focus on DIY research. Presentations will cover a range of topics under this umbrella, including in-house research, internal credibility and more. Registration is free and will give you access to the live sessions and on-demand recordings. In November, come on back for sessions on data quality. To find more and to register go to https://bit.ly/4e3y9cE. See you online!

// E-newsworthy

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Leadership in the market research industry
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Research Industry Voices

Strategies and tips to improve B2B customer retention
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What if your tech moderators were software engineers?

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Thinkpiece

••• shopper insights
Study finds Facebook Marketplace users on high alert

While Facebook Marketplace is wildly popular, with more than 1 billion monthly users, stories of awkward (at best) and dangerous (at worst) transaction interactions are legion. A new study conducted by University of British Columbia (UBC) researchers sheds light on the intricate web of trust, privacy and safety factors shaping users' experiences.

For the study, "Trust, privacy and safety factors associated with decision making in P2P markets based on social networks: A case study of Facebook Marketplace in USA and Canada," researchers interviewed 42 Facebook Marketplace buyers and sellers. "Concerns for physical and financial safety, as well as well-being, were top-of-mind among users, reflecting the inherent risks associated with trading with strangers – particularly because goods are exchanged in person," says Konstantin Beznosov, senior researcher on the study and a UBC professor.

Participants were uncomfortable with the inseparable link between the Marketplace and Facebook, raising privacy red flags as personal details became intertwined with trading activities. They remained vigilant while trading on the site, closely monitoring transactional signals, such as negotiation conversations, location preferences, signs of trader (in)authenticity, impoliteness or flirtatious or patronizing language.

In response to the findings, the researchers proposed increasing user safety and privacy on the Marketplace, including enhancing user understanding of the implications of sharing personal information and adding features that strike a balance between privacy and trust – for example, by implementing a profile verification process.

••• consumer psychology
Too many tasks = too many snacks?

Those who get distracted or multitask while eating dinner may run the risk of overconsuming later, possibly because the distraction caused less enjoyment, according to research published in the Journal of Personality and Social Psychology article "Underwhelming pleasures: toward a self-regulatory account of hedonic compensation and overconsumption."

The study conducted for the article looked at how distraction affects hedonic consumption, or buying and using products and experiences because they make us feel good and not necessarily because we need them. "A person may take great pleasure from one or more of these activities, yet people often consume more hedonic goods than they want or than is good for them," says lead author Stephen Lee Murphy of Ghent University.

One reason for this overconsumption may be distraction. When people are distracted while engaged in a hedonic activity, they may experience less enjoyment from it than if they were fully focused – leading to feelings of dissatisfaction and more consumption later to compensate for the shortfall.

The researchers believe that this proposed effect, which they called hedonic compensation, likely applies to other activities beyond eating. For example, people who are distracted while watching a movie or playing a game may be more likely to engage in additional consumption (e.g., checking social media) to compensate for a diminished enjoyment of the original activity.

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Oy, AI

Joe Rydholm can be reached at joe@quirks.com

Our cover story this issue chronicles one research agency's process for deciding how to move forward with AI and it's no doubt a scenario being played out all across the business world. While more and more researchers – agency and in-house – are dipping their toes in the AI water, many more, especially those on the client side, are hamstrung by a range of factors, not the least of which is dearth of internal direction from the people running their organizations, whether it's the IT and legal departments worried about data privacy and protecting corporate IP or C-suiters still trying to wrap their heads around what AI is and what it could do for (and to!) their businesses.

A recent study of executives and AI leaders conducted for Teradata by research firm NewtonX echoed that sense of uncertainty, finding a general lack of confidence in AI strategies and nervousness about the readiness of AI outputs.

While 89 percent of enterprise executives believe AI is necessary to stay competitive, only 56 percent say their companies have a clear AI strategy and only 28 percent see their AI strategy as closely aligned with and supporting broader business objectives.

Company leaders know that AI has to be introduced and implemented ASAP across the whole enterprise but so far, the survey data found, most successful AI implementations are happening at the departmental level: just 12 percent have deployed AI solutions company-wide, while 39 percent have implemented AI in select departments.

Among those surveyed, the focus seems to be on using AI to increase productivity/cut costs and improve the customer experience but there are worries that AI could potentially damage a company's relationship with its custom-

ers if something goes wrong – obviously a reflection of it being early days with this technology and as a result, we have no real sense of how bad things could be if disaster were to strike.

Trust is key

At the core of all of this, of course, is trust. Trust in the veracity of the data AI generates. Trust in the validity/lack of inherent bias of the information AI is using to produce its outputs.

As one study participant said, "…we want to be very clear with our customers what data has been used to train the models," noting that it can be easy to introduce bias into the models by choosing the wrong training sets. Another said, "…master data management is not glamorous but … if you're basing everything off the data and the data is flawed, then you've got a problem."

More than half (57 percent) of executives surveyed said they are concerned about how AI missteps could impact customer satisfaction, company reputation or both, noting that there needs to be greater cohesiveness between AI and business planning for it to be successful.

Even with internal projects, 63 percent of executives surveyed report using a mix of closed and public data sets, while only 29 percent rely exclusively on closed data sets.

Barriers to scaling AI projects effectively include: scarcity of AI technical talent (39 percent); lack of budget required to scale AI projects (34 percent); difficulty in measuring business impact (32 percent); and insufficient technology infrastructure (32 percent).

About half of executives surveyed have successfully leveraged AI to enhance employee productivity and collaboration (54 percent) and support decision-making (50 percent), yet only a

third have used AI for product development (30 percent) or sales and revenue forecasting (30 percent).

Immense pressure

And, perhaps unsurprisingly, the respondents expressed a feeling of being behind on their AI adoption. With so much press coverage and discussion about AI, leaders must surely feel immense pressure to get with the cool kids and scale up their AI efforts in a hurry. While 73 percent of those surveyed see their companies as early adopters with many technologies, 60 percent said their level of AI adoption is merely "on par" with their competitors. Only 27 percent see themselves as leaders of AI adoption in their industries. Ⓠ

The survey was distributed in the U.S., Europe, the U.K. and Asia and polled C-suite executives and AI decision-makers in companies with at least 1,000 employees and more than $750 million in annual revenues. The survey reached ~300 AI-relevant executives, from companies like Nike, P&G, Hermes Paris, Allianz Partners, Prudential Financial, Honeywell and Novartis, with about half of the respondents located in the U.S.

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Daniel is approaching five years with the company. Our patient warrior, evaluating the perfect shot and always hitting it. Known with our clients for his honesty and ability to have a clear read on a candidate's character, he will always find the fit.

Lindsey has been with the company for 10 years. Her impact on the orga-nization is nothing short of inspiring. Her out-of-the-box ideas and humble approach to business have landed her in a principal posi-tion, guiding the team into success year after year.
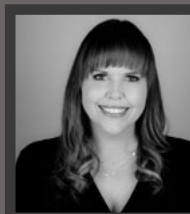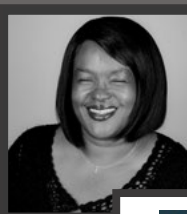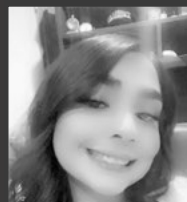
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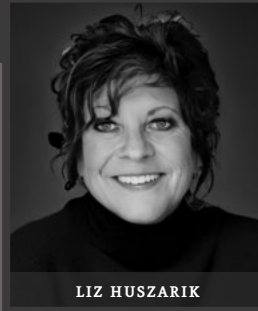

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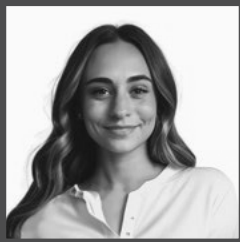
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Reimagining B2B market research

Azurite Consulting is dedicated to transforming market intelligence. Founded by former McKinsey & Company consultant Eli Diament, Azurite is the only full-service B2B research firm that recruits every respondent from scratch, using an integrated approach. This methodology has proven to clients that meticulously executed market research, designed by the right partner, is an irreplaceable asset for the C-suite.

Working with Fortune 500 companies, top private equity firms and leading hedge funds, Azurite has built long-standing relationships by delivering superior, boardroom-ready primary research. Diament emphasizes, "Our team's methodologies and approach deliver the industry's greatest quality alongside conviction in insight and findings – even the most prestigious consulting firms rely on us for their research."

A consultative approach to deliver actionable insight

Each engagement is treated as a management consulting study, underpinned by data collected from the custom research. Azurite partners with senior teams, including the C-suite and boards, to hone the business objectives the research will address.

Driven by their unique methodology, Azurite generates significantly more data than most clients are accustomed to. It is crucial to synthesize these results to enable action. Nick Subic, head of operations, explains, "We remove all noise to focus on the major themes and findings, always backed by proprietary data."

Starting from scratch to deliver proprietary data

Over the course of hundreds of studies, Azurite has honed their from scratch recruitment methodology for surveys, interviews and other unique research.

This machine learning-driven approach enables a significantly larger, higher-quality and more diverse sample than any other provider. By avoiding expert networks or panels, Azurite ensures only fresh, qualified decision makers are included.

Azurite meticulously monitors and dynamically adjusts recruitment during every study to go deeper on findings and cohorts, according to Head of Client Insight Lauren Lubetksy. "By designing precise research and recruiting each respondent from scratch the findings jump off the page."

Powerful results

Azurite executes every research project with exceptional efficiency and precision to ensure that clients receive the intelligence and insights needed to make informed, data-driven decisions. This dedication has made Azurite one of the fastest-growing firms in the industry and a trusted partner for their clients.

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A digest of survey findings and new insights for researchers

••• employee research

Overworked but enjoying the job

Managers willing to take pay cut for lighter workload

Managers have a large effect on employee productivity and engagement, as well as other factors that create a great place to work like building trust, fostering open communication and caring for employees as individuals, according to a study by the UKG Workforce Institute. However, managers also report the highest levels of burnout at work, underlining the critical need for more organizational support to be the most effective in their roles.

Seventy-three percent of employees say their manager's support, encouragement and/or leadership directly motivates them to go above and beyond in the workplace and more than a third (37%) say having a good manager – one who's accessible but doesn't micromanage – makes them feel the most productive at work. Eighty-seven percent believe their manager trusts them, 79% say their manager supports their career goals, 75% feel their manager cares and has empathy for them and 63% believe their manager supports them as a whole person.

When it comes to open communication, a pillar of building a great place to work for all people, 59% of employees say their manager is approachable and easy to talk to. Most employees also have regular conversations with their managers that motivate them. Nineteen percent of employees say these conversations occur daily and 35% say the constructive chats happen weekly.

Managers are feeling a great crunch from the role's responsibilities. Eighty-six percent report experiencing job burnout (i.e., work-related stress associated with physical and emotional exhaustion) – the most of any group, including employees (82%) and even C-suite leaders (73%). So much so, that nearly half (49%) of all managers surveyed say they would accept a pay cut to reduce their workload.

Those who feel supported by their managers feel more engaged in the workplace. Ninety-three percent of employees who say their manager trusts them also feel "energized." They genuinely enjoy work, are passionate about their career, care about their company, co-workers and/or customers and are inspired to always go above and beyond without being asked. Eighty-four percent of employees who say their manager supports their career goals also feel "committed." They like their work and care about their career, they often put in additional effort to make sure they do a good job for their company, support their team and/or serve their customers and they're happy to go above and beyond at work when needed.

It's no secret that being a leader is one of the most challenging roles in the workplace today. Despite the dynamic demands, 79% of managers still say they enjoy being a manager and hope to always remain in a management role. Sixty percent of managers chose the role because they "like to help others succeed." Others point to a higher compensation (54%), career progression (36%) and having power (24%).

Most also recognize that their role expands beyond just managing their teams and often means serving as a coach both inside and outside of the workplace. Eighty-eight percent of managers say they regularly mentor employees and help them advance in their careers and 86% believe they can talk to any of their direct reports or peers about work or personal issues.

Walr conducted this survey from August 16-September 4, 2023, with 4,200 employees in nine countries. In the U.S., the study also included managers and C-suite leaders. Responses were gathered from 1,800 total workers in the U.S. (600 employees, 600 managers and 600 C-suite leaders), 1,000 employees in Australia/New Zealand and 200 employees each in Canada, France, Germany, India, Mexico, the Netherlands and the U.K.

••• shopper research

Too many happy returns?

Online shoppers admit to questionable behavior

Nearly four-in-10 U.S.-based online shoppers (39%) admit to having either engaged in return policy abuse or fraudulent behaviors in the past 12 months, or know of someone who has, found Loop, a return-management platform for e-commerce brands. The behaviors respondents were asked about spanned outright fraud, return policy abuse and other unfavorable return behaviors.

Alarmingly, between 20% and 30% of shoppers who admit to engaging in these behaviors do so at a high frequency. Thirty-one percent of these respondents said they have worn or used an item while planning to return it at least once a week. Over half of shoppers (54%) agree they commonly engage in "bracketing" – ordering multiple items to determine size/fit, with the intention of returning at least one item. Nearly a third (31%) said they needed the money they'd spent on an item back. However, a significant number of respondents had less benign intentions, stating they wanted an item for a single event (36%), they were taking advantage of a lenient return policy (23%) or wanted to keep an item without paying for it (15%).

Fifty-one percent of respondents say it is common for them to order multiple items with the intention to return some or all to determine their size or fit preference. Most respondents (72%) say they will choose to purchase from a company that lets them wear/use the items with the ability to return them over a competitor that doesn't. Nearly all respondents (96%) agree that flexible returns show that a company cares for its customers.

Return policy abuse, fraud and other unfavorable return-related behaviors can exploit the return process, yet some of these behaviors are common and are not always considered by consumers or merchants to be abusive. These behaviors range from minor policy violations to unfavorable behaviors that impact merchants financially to outright illegal activity. The National Retail Federation estimates that 13.7% of returns in the U.S. in 2023 were fraudulent.

Loop surveyed 1,000 U.S.-based consumers who made a return in the last 12 months for an online purchase between November 22 and December 3, 2023.

••• political research

Voters anticipate AI interference in election

Democrats, Republicans feel cybersecurity anxiety

To better understand how voters perceive cybersecurity ahead of the 2024 U.S. election, hardware authentication security keys provider Yubico and Defending Digital Campaigns, a nonprofit offering free cybersecurity tools and resources to federal election campaigns, surveyed registered voters to determine the effects of artificial intelligence and the cybersecurity concerns voters have regarding political campaigns, regardless of party affiliations.

In addition to the threat of AI and deepfakes spreading misinformation, 85% of respondents aren't confident that political campaigns effectively protect their personal information. There is bipartisan agreement with 79% of Democrats and 80% of Republicans showing concerns over AI-generated content being used to impersonate a political candidate or to create inauthentic content.

Forty-two percent of those who have donated to a campaign say their likelihood of donating again would change if the campaign was hacked and 30% report that it would even change the likelihood of a candidate receiving their vote. Over a quarter of respondents (26%) say that when donating to a campaign online, they have not completed the transaction because they were concerned about the security of the transaction and how their personal information would be handled. Forty-three percent of respondents believe that AI-generated content will negatively affect the outcome of the 2024 elections.

From a data security perspective, 85% of respondents don't have a high level of confidence that political campaigns effectively protect the personal information they collect. Fifty-two percent of respondents have received an e-mail and/or text message appearing to be from a campaign that they suspected was actually a phishing attempt.

Registered voters would like to see campaigns and candidates take precautions to prevent their websites from being hacked (42%), use strong security measures like multifactor authentication on their accounts (41%) and have policies in place and train staffers and key volunteers on cybersecurity for the campaign and protecting personal information (38%).

The survey was conducted by OnePoll with 2,000 registered voters in the U.S.

••• health and wellness research

Foods with benefits

Americans crave wellness products

More than half of Americans (55%) say they're more likely to try a new product if it's marketed as being aligned with a healthier and more sustainable lifestyle, according to advertising effectiveness company NCSolutions.

Over half of American consumers (59%) recently purchased a new product because of its health benefits. Nearly half (47%) say they've specifically purchased a food or beverage product in the last 30 days to get more vitamins or nutrients, to improve sleep (33%) and to support gut health (29%). Twenty-seven percent of Americans purchased a new product because it is good for the environment.

Younger generations are more likely to consider the effect of their food or beverage product choices on the environment than older generations. Forty-eight percent of Gen Z and 44% of
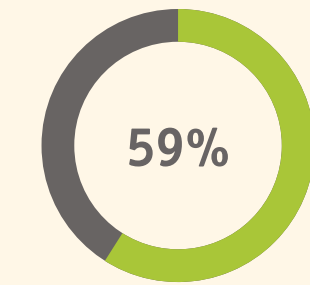
59%

recently purchased a new product **because of its health benefits.**

27%

purchased a new product **because it is good for the environment.**

Millennials consider this effect always or often, compared to 33% of Gen X and 29% of Baby Boomers. Likewise, younger consumers factor in the effect on the environment of their choice of laundry or cleaning products more often than older consumers. Fifty-one percent of Gen Z and 41% of Millennials consider this effect always or often, compared to 33% of Gen X and 35% of Baby Boomers.

Almost half (47%) of consumers say that when they see a brand advertising products they typically buy, they're more likely to keep that brand in mind the next time they shop. Additionally, if a brand's mission aligns with the consumer's values, 58% say they're very
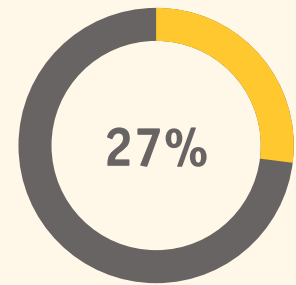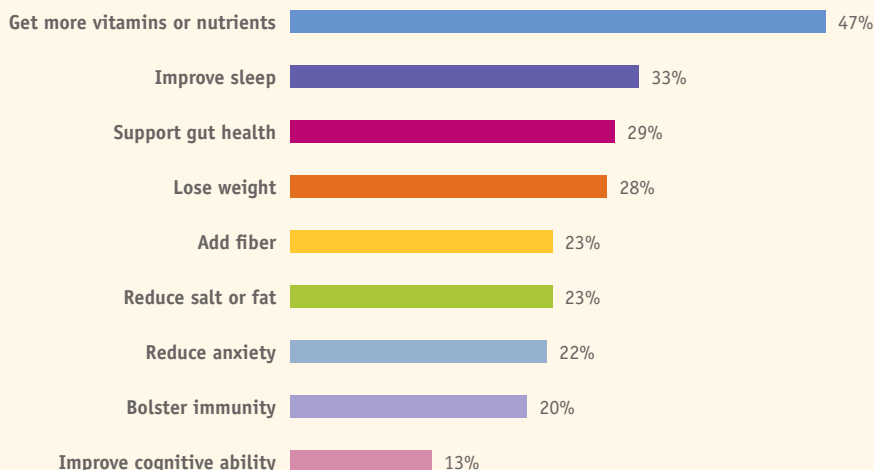
or completely likely to buy that brand's product. When a CPG brand's healthy and sustainable marketing message syncs with a consumer's values and preferences, 42% say it enhances their overall positive brand perception. However, controversial stands from a brand can also backfire as 28% of Americans prefer to keep controversies out of the shopping cart, while 19% only like it when the brand agrees with their own opinions.

Health- and eco-conscious consumers are most influenced to buy a wellness or sustainable product after seeing it advertised on TV and ad-supported streaming (44%) followed by social media (39%) and internet/website display ads (37%).

Celebrity and social media influencers can also hold sway over a consumer's decisions. However, the impact of endorsements is split – 55% of consumers are at least somewhat likely to try a product that improves well-being or the environment when there is a celebrity or social media influencer involved. In comparison, almost a quarter of Americans (24%) are not influenced by a celebrity or social media influencer who endorses a healthier or environmentally conscious product. Consumers are most likely to purchase products that support a healthier self or healthier earth at the grocery store (67%), on a website (39%) or in a drug store (39%).

NCSolutions commissioned this survey of 1,104 Americans in February 2024.

Functional food frenzy

Get more vitamins or nutrients	47%
Improve sleep	33%
Support gut health	29%
Lose weight	28%
Add fiber	23%
Reduce salt or fat	23%
Reduce anxiety	22%
Bolster immunity	20%
Improve cognitive ability	13%

••• small business research

Keeping an eye on AI
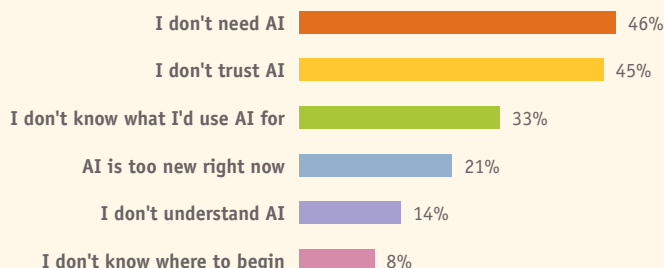
Business owners waiting to adopt new tech

While only 39% of small businesses are currently using AI, that percentage is expected to jump to 51% by the end of 2025. There is good reason for the anticipated uptick. In quantifying the benefits of AI tools, small business software platform Thryv found that more than half of responding AI users expect to save between $500-$2,000 and up to 20 hours per month.

With the time saved using AI, small business owners would use the extra hours to improve current processes (52%), attract new customers (46%), develop ideas to expand the business (46%), develop marketing or other content (45%) and spend the extra time with customers (31%) and employees (21%). With the money saved, small business owners would add products, inventory or additional services (52%), increase their marketing and advertising (51%), add more technology or software (41%), improve or add business locations, vehicles or equipment (29%), pay down debt (28%) and hire more employees (26%).

Small business owners appreciate how AI can impact how they operate and 73% say it will offload repetitive tasks, 67% believe it will give them some personal time back, 58% say it will help with resource constraints and 37% think AI will make them less reliant on employees.

When asked if they needed to add a new resource to their business, and either a person or AI software could perform the task equally well, small business owners were evenly divided with 36% preferring to purchase AI software, 34% preferring to hire a new employee and 30% saying they would choose the least expensive option. AI usage increases along with the size of the business. Forty-seven percent of businesses with 10+ employees use AI, 40% of businesses with five to nine employees use AI and 27% of businesses with one to four employees use AI.

Age matters when it comes to AI adoption. Less than a third of small business owners aged 60+ are using AI and almost half in this age group do not plan to use AI for their business. Forty-three percent of small business owners using AI are in the 21-49 age range. Forty-two percent of 21-49-year-olds, 39% of 50-59-year-olds and 33% of those 60+ are not sure whether they will incorporation AI in the future.
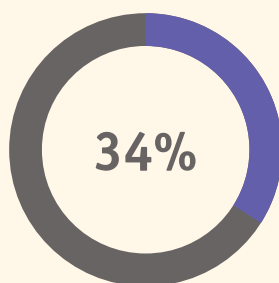
Thirty-three percent of respondents feel they are becoming less competitive the longer they wait to adopt AI but 63% say they want to see how AI effects other small businesses before making the final decision. Forty-six percent say they don't need AI, 45% don't trust AI, 33% are not sure what they would use it for, 21% say AI is too new, 14% don't understand it and 8% are unsure where to begin.

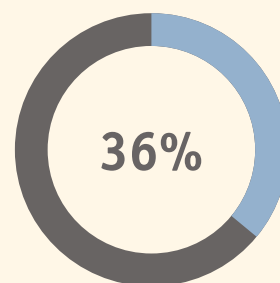*Thryv conducted the survey of 500+ small business owners in April 2024.*

Why are you **not planning to use AI** in your business?

- I don't need AI — 46%
- I don't trust AI — 45%
- I don't know what I'd use AI for — 33%
- AI is too new right now — 21%
- I don't understand AI — 14%
- I don't know where to begin — 8%

If a person or AI software could perform a task equally well, **which resource would you prefer to add to your business?**
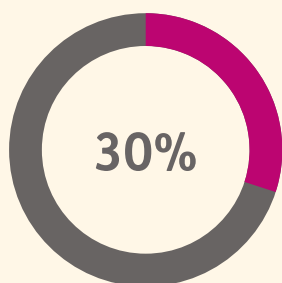
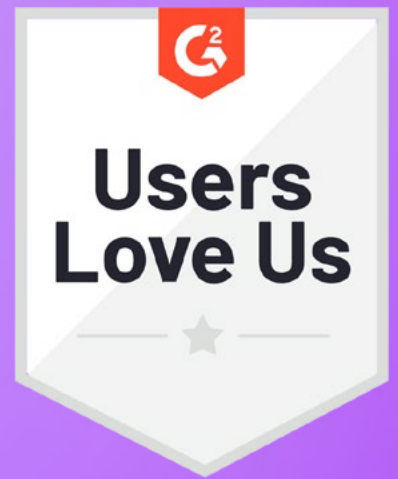- 30% — I would prefer the least expensive option.
- 34% — I would prefer to hire new employees.
- 36% — I would prefer to purchase AI software.

••• real estate research

A unique path to home ownership

Prospective buyers weigh options

From purchasing multifamily properties to co-owning with friends and family, prospective buyers are willing to get creative to become homeowners in the next 12 months, reveals real estate company RE/MAX.

With fluctuating market conditions and the uncertain rate environment, nearly 80% of prospective homebuyers are considering adjusting their purchasing plans. Forty-three percent of respondents have considered other property types (fixer-upper, foreclosure or tiny home) and financing options. Fifty-six percent say they would consider purchasing a fixer-upper in need of remodeling, either for cosmetic or structural reasons. Thirty-four percent of respondents would consider purchasing with a down payment of less than 20% and more than nine in 10 respondents were somewhat or very likely to discuss their alternative options with a real estate agent.

Affordability remains top-of-mind for homebuyers. Seventy-three percent of those who indicated they would consider purchasing a fixer-upper wanted the chance to purchase a home at a lower listing price. More than a quarter of consumers indicated they would consider purchasing a multifamily home, defined as a property occupied by the owner and additional non-owner tenants, and half of them would do so to split the cost of monthly mortgage payments.

Thirteen percent of prospective homebuyers reported they'd be willing to consider a long commute, buying a home over two hours away from where they work, for more affordability. Of the 34% of prospective homebuyers considering borrowing with a down payment of less than 20%, over 75% would do so because it's what they can comfortably afford, and half would expect to make a down payment of 10% or less. Fifty-seven percent of respondents who indicated they would purchase a condo, attached home or townhouse would do so to achieve lower maintenance costs.

Respondents also want to make a home uniquely theirs. Of those who reported they would consider purchasing a fixer-upper, nearly 70% would do so to allow them to start with a clean slate. Twenty-eight percent of these
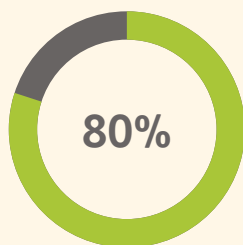
28% would consider purchasing a home with a **friend or family member.**

respondents are willing to pay $30,000-$50,000 for repairs and renovations, with only 10% saying they'd spend upwards of $90,000. A majority said they're willing to spend less than $70,000, with 23% saying $50,000-$70,000 is their limit and 25% indicating their sweet spot is $10,000-$30,000.
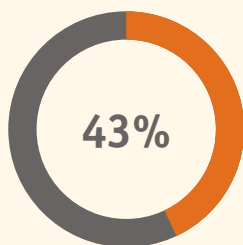
Buyers aren't shying away from asking for help on the path to homeownership. Twenty-eight percent of respondents would consider purchasing a home with a friend or family member and 17% are willing to ask for help from friends and family when purchasing a home.

Data is based on a survey conducted in partnership with Pollfish and fielded October 16, 2023, among 1,000 men and women in the U.S. between the ages 18-54+, who plan to purchase a home in the next 12 months.
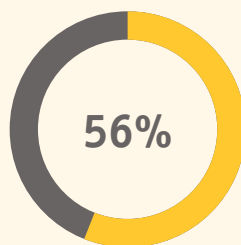
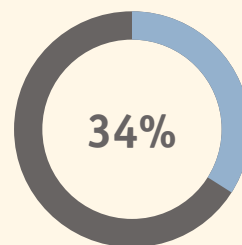## Prospective homebuyers face fluctuating market conditions and an uncertain rate environment

80%

are considering **adjusting their purchasing plans.**

43%

have **considered other property types** (fixer-upper, foreclosure or tiny home) and financing options.

56%

say they would **consider purchasing a fixer-upper** in need of remodeling, either for cosmetic or structural reasons.

34%

would consider purchasing with a **down payment of less than 20%.**

●●● special advertising section

8 TOP GENERATIVE AI COMPANIES

Artificial intelligence can improve your team's productivity while cutting costs and saving time. There are many generative AI technologies hitting the market but only few target the marketing research and insights industry.

These companies offer a wide array of tech resources, AI assistants and proprietary platforms to fit your every need. Whether you need to transcribe an interview, translate text or analyze large amounts of data, these experts have your back.

AnswerRocket

Founded 2013 | 50 employees
Alon Goren, CEO

AnswerRocket is the leading generative AI analytics platform for data exploration, analysis and insights discovery. Trusted by companies like Anheuser-Busch InBev, Cereal Partners Worldwide and Suntory Global Spirits, AnswerRocket empowers enterprises to accelerate time to insights. Our AI assistant, Max, helps users get narrative answers, insights and visualizations from their data – just by chatting. Powered by LLM technology and advanced analytics, Max makes data analysis as easy as conversing with an always-on analytics expert. With AnswerRocket, insights teams can swiftly analyze both structured and unstructured data, pinpoint key performance drivers and automate routine analyses. Market research teams can stay ahead of market and consumer trends and gain a competitive advantage with AI-generated insights on demand.

Phone 1-678-608-0053
www.answerrocket.com

Applied Marketing Science (AMS)

Founded 1989 | 40 employees
John Mitchell, President and Managing Principal

Knowing your customers better than anyone else creates incredible opportunities for competitive advantage. Voice of the customer (VOC) has been a best-practice front-end of innovation activity for decades but executing systematic VOC can be time-consuming and labor-intensive. Applied Marketing Science's revolutionary machine learning algorithm uses information gathered from existing customer-generated content and secondary research. It then utilizes sophisticated multivariate data modeling and analytics to uncover the customer insights needed to design better products and superior customer experiences. Generative AI can unearth the beyond-the-obvious customer needs necessary for successful product development even in complex, technical or nuanced categories.

Phone 1-781-250-6300
ams-insights.com/machine-learning-ai

Cascade Insights

Founded 2006 | 13 employees
Sean Campbell, Co-founder and CEO

Cascade Insights offers customized market research and marketing services for B2B technology companies. In an industry that's ever-changing, we empower you to confront emerging challenges and capitalize on unexplored market potential. Want to learn how well your brand resonates with buyers or why your superior product keeps losing to a competitor? Maybe you need updated messaging to win more deals and generate more leads. Using generative AI, we can answer your critical business questions faster with high-quality research findings tailored to your specific business goals. Whether it's the discovery phase of a research project, working through the analysis phase or how we represent a project's findings, we know exactly how and when to safely leverage AI-powered tools as part of the research workflow. Contact us to see how we can blend human and AI-based approaches to best fit your needs.

Phone 1-503-212-0687
www.cascadeinsights.com

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Annie McDannald, Global Vice President, Marketing Research Services

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Fuel Cycle

Founded 2007 | 125 employees
Eran Gilad, CEO

Fuel Cycle unleashes the power of decision intelligence for legendary brands. We achieve this by enabling brands to rapidly capture and act on the mission-critical insights required to launch new products, acquire customers and gain market share. Our technology enables decision makers to maintain constant connections with their customers, prospects and users to uncover real-world actionable intelligence and insights. By integrating human insight with critical business data, and through automated quantitative and qualitative research solutions, the Fuel Cycle Research Engine powers product innovation, brand evolution and enhanced user experience.

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

Glimpse

Founded 2021 | 15 employees
Neil Dixit, Founder and CEO

Glimpse is a next-generation market discovery platform uniting human insights and AI-enhanced performance. Marketers, researchers and creators use Glimpse to enable effortless decision-making, create powerful content and achieve perpetual advantage. With Glimpse, ASK any question. FIND any audience. ANALYZE any data source. Use AI to UNCOVER

. . . behavior, emotions, awareness, purchasing decisions and more. Then HARNESS Glimpse's industry-leading AI customer chat, AI segment chat and enriched data capabilities to bring your data to life. We're the only platform that infuses the power of generative AI into every single stage of the research, analysis, insights and content creation process. That's why Adweek says Glimpse's approach is "changing the business of marketing."

Phone 1-813-748-8882
Glimpseahead.ai

SightX

Founded 2014 | 50-100 employees
Tim Lawton, Co-CEO and Co-founder

SightX is an AI-powered end-to-end market research platform that enables teams to learn at the speed of their customers. Access the insights industry's first and only true gen AI assistant, Ada, that works alongside you, shares knowledge, builds projects with just a prompt, analyzes data and provides everything from executive summaries to blog posts and ad campaigns. Streamline your entire research process in a single, unified hub. Stay ahead of trends and quickly identify changing consumer behaviors in real time. The result? Confidence to make the right decisions, with the right insights, at the right time.

E-mail hello@sightx.io
www.sightx.io

Yasna.ai (SIA Tiburon Research)

Founded 2013 | 21 employees
Rimantas Reimontas, Managing Director

After automating online quantitative tests in 2017 (have you had a chance to try our platform, Fastuna.com?), we are proud to democratize qualitative research – particularly in-depth interviews – with our new platform, Yasna.ai. Do you conduct qualitative research? Yasna can do the same job, but faster and cheaper. Need global coverage? Yasna speaks any language. Tired of routine transcript analysis? Yasna provides interview summaries, structured reports and even quantitative data. Looking for ideas to drive your innovation cycle? Yasna is here for you. Any existing qualitative tasks or those that were "nice to have" but always postponed are now feasible within a few days. Try it for free on our website.

E-mail ask@yasna.ai
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Thinkpiece

Just measuring customer satisfaction isn't enough

| By Doug Berdie

abstract

Improving customer loyalty and satisfaction requires organization-wide commitments to act on research results by involving and informing employees and developing and implementing systematic plans.

The field of customer satisfaction has always been closely aligned with desires to improve the quality of a company's products and services. Marketing researchers who are serious about their profession study the effects of the research they conduct, keep up to date with approaches others are trying and strive to continually improve the effectiveness of their work – both in terms of the research techniques used and the effects their data have on improving quality. Over the past 40+ years in this business, many insights have become obvious to me. Some of these include:

Customer satisfaction is a necessary, but not sufficient, condition for customer loyalty and retention. My research and that of others has shown convincingly that many highly satisfied customers do not remain loyal and some customers who are not satisfied do remain loyal. What this means is that satisfying customers must be a high priority because it at least makes it possible

to retain them. However, each company must also determine the other factors that are necessary to retain customers. Only when both conditions are met will a company have a solid customer retention practice.

Customer satisfaction research and improvement efforts require a commitment from top management. Companies that embark on customer satisfaction efforts without the backing of top management usually fail to garner the resources needed to conduct quality research and to design and implement the types of changes required to improve customer satisfaction. Corporate downsizings and other cost-cutting activities have placed a premium on resources and those deemed most critical by top management usually prevail.

Customer satisfaction activities must be viewed as positive by employees not as weapons being used by management. If employees believe customer satisfaction scores will be used against them, they will openly or furtively sabotage the effort. Employees need to see that improved service to customers makes their life easier, helps the organization and benefits everyone. Using scores to focus on individual employees must be carefully considered, as must equitable ways to use CSI scores to drive bonus/incentive programs.

Sharing the good news with employees is as important as sharing the "improvement opportunities." Well-designed customer satisfaction research systems identify customers who have unresolved problems and quickly feed that information back to those who can address the issue. If this feature is not supplemented with continued feedback of the "good news," the system becomes painted with a negative brush and all feedback becomes greeted with, "Oh, no!

More bad news!" Positive feedback helps unite the employee teams responsible for providing customer satisfaction and retention.

Customer satisfaction research without action-oriented presentations and a commitment to follow-up research with action will not lead to success. The marketplace is filled with companies that have collected customer satisfaction research data and are disappointed because they have seen no results from their activities. Research, by itself, collects information. Information is not action; it facilitates the planning of sound actions.

Research data presented in certain formats is more easily translated into action than data presented in other ways. The clients I have worked with have been successful in "turning data into action" because 1) major effort is spent translating the data into business language that addresses client issues and 2) clients always receive key summary themes that run through the data and specific, implementable recommendations based on those themes.

Good intentions alone don't result in improvement. Merely knowing the areas of customer satisfaction and trying to address them through good intentions (without an organized set of predefined activities) will not result in improvements to customer satisfaction. Improvements only result when action plans are clearly defined, formalized and implemented.

Improving customer satisfaction requires prioritization and focus of effort. Effective customer satisfaction research must identify those parts of the customer experience that most influence satisfaction. Among these, a manageable number (usually not more than two or three) of the ones offering the most po-

tential benefit from improvement must be targeted for action. This approach ensures that you are addressing the things that matter most to the customer and are focusing your attention rather than diluting effort across too many areas.

Most customer satisfaction improvements come from changes in the behavior of company employees. Whether changes are needed in employee attitude, how employees relate to customers, product/service changes, billing changes or delivery changes, it is people who make those changes. To change the behavior of employees, four things must occur: they must be told clearly what they are to change and why; they must be told how they will benefit from the change; they must be given tools to make the changes; and they must periodically be told what progress they are making in changing their behavior. For these conditions to be met, a good upfront and ongoing communication system is needed as well as some form of reward/recognition based on the behavior changes.

Implementation of action plans occurs most effectively when baby steps are taken. Businesspeople are very busy. Every day, crises emerge to be dealt with, making it difficult to tackle new initiatives. Effective customer satisfaction improvement starts with small baby-step activities that overcome workplace inertia. Breaking work plans into small tasks makes it easier to start and easier to complete them when time is limited.

Clear demonstration of positive ROI related to customer satisfaction activities is needed. Some management is willing, initially, to take on faith that improved customer satisfaction leads to increased profits. However, even these managers usually require proof of ROI from their expenditures after one or two years. Make plans at the very start of the customer satisfaction effort for how you plan to provide this type of evidence.

Satisfaction is only the first step in building long-term, loyal customers. Once the satisfaction drivers are uncovered and addressed, organizations must focus on gaining a thorough understanding of the factors that affect retention and loyalty so they can mount a systematic effort to address them. The factors vary from organization to organization and research is required to help identify which ones are in play for your firm. Things like barriers to switching, the purchase process, marketplace conditions, product/service availability, personal relationships with customer contacts, etc., all need to be investigated to design the most effective customer retention and loyalty process.

Try new tactics

Customer satisfaction/loyalty research has been around for a very long time. Those in the field who see the most benefit from it are those who continually learn from others and are willing to try new tactics to accelerate the benefits clients see from their research expenditures and efforts. Hopefully, the above insights will help in that process. ⓞ

Doug Berdie is president of Consumer Review Systems. He can be reached at dberdie1@msn.com.
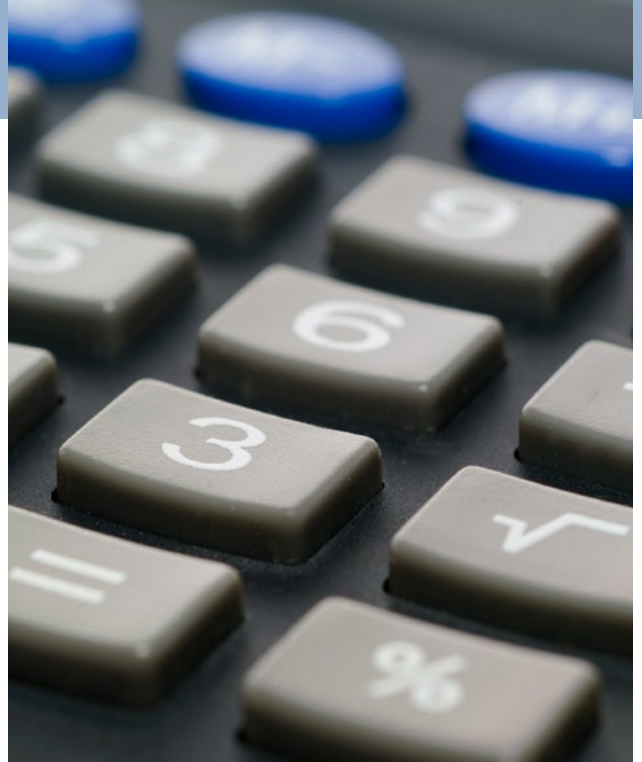
Beyond Excel: Why you should integrate software development tools and principles into your research

| By Adi Sarid

abstract

Bring your data analysis up to date by incorporating scripting, coding, version control and other software development concepts into your day-to-day routines.

A good friend once shared his perspective on spreadsheets: Excel is the second-best tool for anything. The "best tool" depends on the specific goal you are trying to accomplish.

In the far-away past, we extensively used Excel (and SPSS) in our daily market research activities and the statement that Excel is a great tool seemed reasonable. I no longer agree with that. The allegory is that we were using basic analysis tools, feeling great about it, without knowing we were shooting ourselves in the foot. These basic tools have significant pitfalls and this article is about how we now avoid them by integrating software development tools and principles into our day-to-day market research routine.

The following is not a complete list but are some powerful concepts and tools that guide us and can revolutionize any business in market research if utilized correctly. Some are easy to implement and some are advanced, but even implementing a small portion can make a big difference. Also, note that this article's perspective is highly biased towards quantitative research, the field I'm primarily associated with and active in. Some of my principles might also apply to qualitative research but that is not the focus here.

Coding: Building reproducibility into market research

I'm a data scientist and most of my team is also. Our analysis is conducted primarily with R (and some Python) by coding. R is a statistical-oriented programming language and Python is an all-purpose programming language (with data science extensions). After we collect or receive data (e.g., from a surveying tool or other sources), we code a pipeline that loads the data into R and conduct all the analysis in R.

Coding this way is usually referred to as "writing a script." It creates a straightforward recipe that includes the steps to generate the results. Similar to how software works when it runs its code, we are building software that runs our statistical analysis.

The significant benefit of this approach is reproducibility. Anyone allowed access can run the same script and get the same results. Testing is easier; one

can review the code and the results and find errors, if any, in the computation. The available packages in R can produce presentations (e.g., PowerPoint), reports (HTML, PDF) and even interactive dashboards.

Another advantage is that you can start building the analysis before the data is wholly gathered because refreshing the results is just re-running the already-written script. This method helps shorten the time to complete the project.

Older software supports scripting or coding but to a lesser extent. For example, SPSS has a scripting language but "encourages" the use of a graphical user interface for analysis. Excel (although supporting VBA for programming) is widely used as a spreadsheet with formulas and user-interface actions. Documentation is poor, it's hard to test and verify results and Excel users tend to corrupt data files (i.e., with merged cells, dates, encoding meaning with "cell-coloring" and other harmful practices). Also, more than once, I ran into users who could not explain the complex Excel file they had built just a few months prior (let alone someone trying to understand a file created by someone else).

To summarize this point, replace old tools (such as Excel and SPSS) with R (or Python). The effort is significant but the benefits are enormous. An excellent book to start with is "R for Data Science," available online for free (https://r4ds.had.co.nz/).

Coding
Implementation effort: significant
Benefit: enormous

Version control: Safeguarding accuracy and promoting collaboration in market research
Following the previous point, when you use code to create your analysis, you can also start using version control practices (i.e., with services like GitHub). Version control is a familiar term to most developers and it means that every change in a script (in analysis) is "committed" to a code repository. The repository tracks all changes and lets us go back in time to undo any changes or compare versions. We can compare two versions of the analysis (termed "branches") and combine them (merge) – making it easier to collaborate without interfering. In addition, all projects are managed in repositories within an organization so it is easy to retain, search and share all the organization's knowledge.

If you ever had to save files like: "file_ver1," "file_ver1_backup," "file_ver1_backup_of_backup," "file_ver2," "file_ver2_after_cleanup," etc., then you should stop and move to using version control. I can't imagine a world without it.

If you are already familiar with coding, the implementation effort is small and the benefit is enormous. There are many tutorials online (just search for "learning git" on Google).

Version control
Implementation effort: moderate (assuming you are coding)
Benefit: significant

Automating deliverables: Scaling your analysis
As a benefit of coding, you can easily automate deliverables. Specifically, a use case we often see when working with customers whose activities are spread across multiple regions or branches is the need to generate segmented reports, e.g., presentations for numerous stakeholders across different areas or departments. Such automation becomes relatively straightforward when the deliverables are script-generated. All you have to do is loop over the various regions and run the same script to generate your delivery. Manual work might be needed if the delivery requires human intervention for insights (though this might also be automated with AI integrations).

Similarly, a report that is required on an ongoing basis (e.g., weekly or monthly) can be easily automated with minimal effort.

Automating deliverables
Implementation effort: limited (assuming you are coding)
Benefit: significant

Cloud infrastructure in market research: Security and robustness
When I say "cloud," do you think of … rain? Most people think of precipitation. Those who write documents or create presentations also think of Google Workspace (formerly G Suite) or Microsoft 365. In the software development industry, however, cloud is a term that describes a wide range of services that companies like Amazon (AWS), Microsoft (Azure) and Google (GCP) provide. These services include servers or other integrations such as AI solutions, custom automation, etc. Most of our analysis is done on cloud infrastructure (and not on local computers). The benefits you gain from using cloud infrastructure include improved security and robustness (i.e., from a business continuity perspective).

Cloud infrastructure enables automation without user interventions (such as daily reports or online dashboards). At the more advanced level, cloud infrastructure allows us to serve customers with customized prediction models developed based on their data (generally called machine learning models) or push processed data files related to ongoing surveys.

Using cloud infrastructure opens up a lot but requires significant expertise. Suppose you're serious about moving to the cloud. In that case, you might consider hiring or consulting with companies that provide DevOps (developer operations) or MLOps (machine learning operations) as a service.

Cloud infrastructure in market research
Implementation effort: enormous (requires a high level of expertise)
Benefit: significant

Documentation: Transparency and organizational memory
A fundamental pillar in software development is documentation. It allows for transparency and improves the organizational memory. When you work like a software developer in your market research analysis, you document the processes you do and the results you get, either via comments in your script or via "notebooks," which are a combina-

tion of text, code and outcomes of that code (e.g., charts and tables). These notebooks have many forms depending on your programming language (e.g., RMarkdown for R, Jupyter for Python or Quarto for a more language-diverse approach).

Using notebooks also opens up many other options, like quickly building a website, a blog or a statistic dashboard that documents your work. I even used notebooks to create interactive tutorials for my undergraduate students learning statistics.

Documentation
Implementation effort: moderate
Benefit: significant

Packages: Efficiency, consistency and speed in market research
A saying goes: "When you find yourself repeating a piece of code more than three times, it's time to write a function." As mentioned earlier, our analysis is conducted by running scripts. When you use scripts, you find yourself repeating many operations, like refactoring variables the same way or creating the same type of graph repeatedly (but on different variables or even different projects).

When you utilize code, the practice you should stick to is to break your code into functions, i.e., smaller units that do a specific task. Then, you can combine these functions into a library ("package"). This improves the work in several ways:

- You become more efficient – you run the function instead of rewriting your script.
- You become consistent and more accurate – the function's correctness is verified once and reusing it puts you in a safe place.
- You can share your function internally (proprietary packages) or even with the world (open-source packages), which lets other people use your functions and enjoy these benefits.
- From an organizational perspective, it shortens the learning curve for new employees and also guides the

organization to converge on a unified standard for analysis and research.

Packages need to be built and maintained, which requires a slightly higher level of expertise from a development perspective. However, the benefits are across the board.

Packages
Implementation effort: significant
Benefit: enormous

Team management strategies: Synchronizing efforts for success
Compared to the previous concepts, which were primarily technical, this is more of a "soft" concept relating to managing market research teams and projects.

A few years ago, I started using daily meetings of about 15-30 minutes each morning for the entire team. It might be trivial but I didn't think about it until a friend suggested it as an excellent way to stay on top of things (the same friend from the beginning of this article).

Daily meetings are a common practice in software development teams and they are handy for syncing the team, sharing challenges and ensuring that everyone knows what they are doing. It also lets me know when someone is about to finish up and needs the next task – resulting in improved planning and fewer surprises.

Many elements of software development management can be adopted into market research project management. In addition, many tools support project management and draw from valuable elements such as kanban, agile, scrum, sprints and more. This article is focused on something other than project management but browse the different project management methods and tools used during software development and consider what would work best for you. There's a bit of trial and error involved.

As a general start, I can recommend "Death by Meeting" by Patrick Lencioni; it's a fun read and sets the tone for an excellent organizational culture in terms of setting meetings.

Team management strategies
Implementation effort: moderate
Benefit: Moderate-significant (depending on how efficiently you are managing today)

Immense potential
In conclusion, the fusion of market research with software development principles is a paradigm shift that offers immense potential for revolutionizing the industry.

By embracing coding as a fundamental aspect of analysis, market researchers can achieve unparalleled reproducibility and efficiency, leading to more reliable and insightful results. Adopting version control practices ensures accuracy and fosters seamless collaboration, while automation streamlines processes and enhances scalability. Leveraging cloud infrastructure enhances security and robustness and enables advanced functionalities such as predictive modeling and automated data processing. Moreover, prioritizing documentation cultivates transparency and preserves organizational knowledge, facilitating continuous improvement and innovation. Developing and utilizing proprietary packages further amplifies efficiency and consistency while effective team management strategies ensure synchronization and maximize productivity.

By embracing these principles and tools, market researchers can break free from the limitations of traditional approaches, paving the way for unparalleled insights and success in an ever-evolving landscape.

In short, think more like software developers. To support such a transformation, you might want to consider hiring a few senior data scientists (if you don't already have them in your organization). ⓘ

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THE Q REPORT
CORPORATE **RESEARCHER** REPORT

Findings from the Q Report, an independent study, written for and developed with the help of client-side marketing research and insights professionals
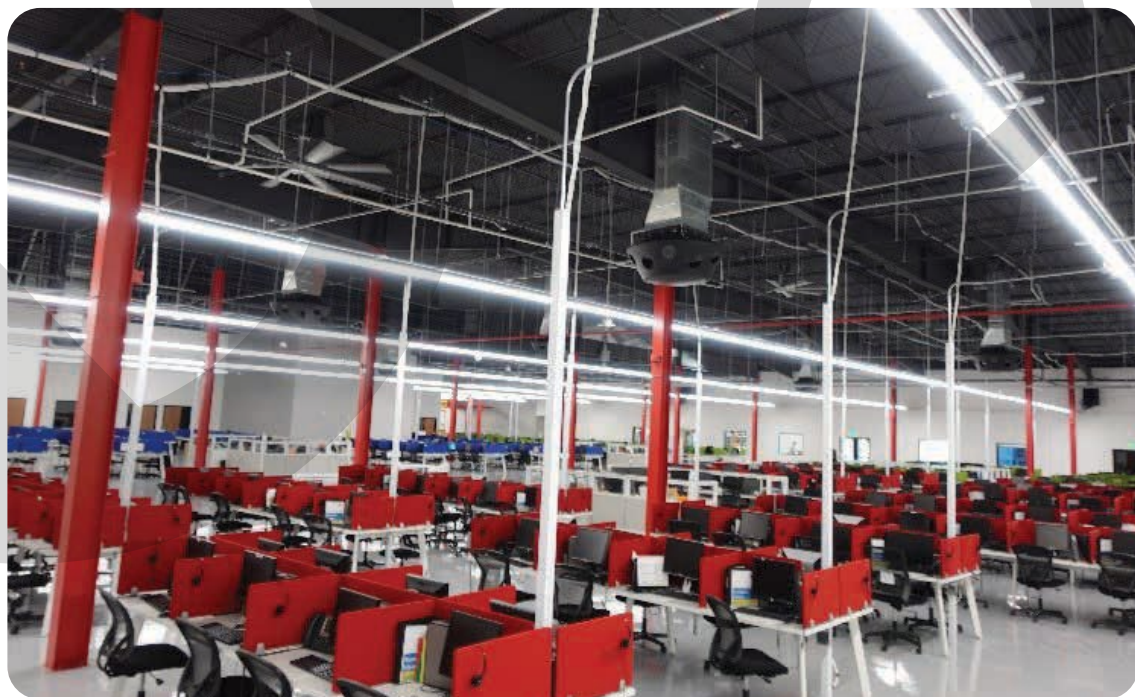
Are organizations lacking customer understanding?

Researchers hope AI will boost listening-tool effectiveness

| By Marlen Ramirez

abstract

Q Report respondents consider how well their organizations know their customers and the barriers they face while improving customer understanding.

How well does your organization know its customers? The 2023 Q Report asked respondents to elaborate on their feelings regarding their company's customer understanding and while many respondents say their company knows its customers well enough, some more nuanced open-ended answers stuck out.

Some feel their organizations don't understand their customers or have a stable understanding of their market's customers.

Not nearly as well as we should. Too often product and other people rely on anecdotal information vs. hearing/listening to the voice of the customer. In some areas, they know their customers well, but in too many areas they really know very little about them.

Not very well given that it is my job to understand its customers and I'm tasked with other things.

We are still a product-driven company and most stakeholders believe a) our cars will sell themselves or b) they know their customers. But as Mark Ritson always says: You are not your customer.

We are getting there in our understanding. I would say we are lukewarm right now in regards to our own customers since the function is still new. What we lack currently is stronger market understanding – we really do not understand the market's customers at all.

Others say their organizations believe they know their customers when in reality, they are falling short.

Overall, we know our customers well but we suffer from confirmation bias and using small or anecdotal evidence to validate preconceived notions about what we

think we know about our customers. We also have blind spots when it comes to prospects and former customers.

That's a loaded question – many think they know the customers, based on a couple, but our customers' needs have changed and assumptions about their needs are falling flat.

I would say we have a basic understanding and good routines for learning more but it does not seem we know our customers intimately.

Pretty well, and I think our strong NPS and CSAT scores prove that, but as with many companies, I feel most departments can become "silos" at times and it hinders them from being able to see the customer journey on a broader level.

Meanwhile, other respondents indicate that their organizations know their customers' wants and needs and cite the methods they have implemented to better understand them.

Pretty well. We use a custom donor segmentation to help us profile our donors behaviorally and psychographically.

Very well. We conduct projects throughout the year as needed to prepare for future trends, in addition to rolling research which maintains our understanding of the ever-changing components of our industry.

We have ongoing anonymous surveys as well as focus groups where we invest a lot in knowing our customers.

Regardless of whether organizations know their customers, most agree they could know them better and are planning to act on it.

We know demographics and behaviors but not what drives their hearts and minds. Because of this we are currently running a needs-based segmentation study.

We know our customers relatively well but we need to know our prospects better in order to grow.

Our company knows how customers feel about our own products/brands but we have a larger opportunity to understand the consumer in general in order to build empathy within the organization.

We have a strong understanding of current users but still opportunity to learn about potential users.

Some of the largest barriers companies face when improving their understanding of customers include lack of resources (40%), lack of provable ROI (15%), low response to customer research (12%), lack of C-level support (11%) and lack of internal faith in the insights department (6%). Only 7% say the available tools for understanding customers are not effective.

Respondents shared some thoughts on the marketing research or listening tools available, their value and whether any additional capabilities are necessary. They feel that the tools are effective but that their organizations lack the manpower needed to effectively analyze findings.

Yes, effective. But understanding data and extracting insights and mapping it to solve business challenges is not happening as consistently as expected. Team is overwhelmed with data and hard to make sense most of the times.

Listening tools we have in place are very effective; we lack the tools and/or manpower to take the data and turn it into valued information (open text answer analysis, for instance).

It is less about the tools than it is insights professionals making the learnings relevant for a broader stroke of stakeholders.

Every day my consumer insights department is getting better and better at knowing who our customers are. Figuring out products that are available to us that we can use is our biggest challenge – doing research with a limited number of personnel. Not enough hours in the day.

While research tools are nice to have, they are difficult to use due to the security risks associated. It is challenging to ask the right questions while sticking to the budget and upholding security standards.

My struggle is that I need something that is defensible to federal clients (who have concerns about data privacy) but is also lean and nimble enough that I'm not soaking my budgets with several thousand-dollar costs outside of labor. We're contractors, so those are things we have to "eat." The time spent on less-efficient but cheaper tools can sometimes be offset by the fact you can bill that time.

They are effective but could be better. We often can't ask about what we want to because it's sensitive or unreleased information and there are leak risks, so we generalize and it's not as specific as we'd like.

Somewhat effective but open to great risks associated with bots, fraud. We need better representation of our customer base and the market that's quick and cost-effective but also with controls building to reduce the risks of fraud.

Some respondents hope AI will improve the tools available to create more efficient processes.

The bots and spam in online quant research are getting harder and harder to detect and filter out; it would be great to have a way to filter and clean the data rapidly and effectively.

We (the industry) seem to be getting there. I'd still like to see more options for online platforms where analysis, insights generation and reporting can become quicker through AI automation. It would be great to be able to spend less time reviewing responses and more time reviewing potential insights.

There needs to be an easier way for marketing researchers not versed in SQL or Python to append customer, transactional and operational data to survey data

collected for richer insights. It's a steep learning curve and I'm hopeful generative AI can help with this challenge.

I think there are a lot of great tools to deeply understand consumers but it does take time to do it AND communicate effectively, in a story-telling way, across the organization. I strongly believe that AI will enable us to accelerate and improve.

Regardless of the implementation and effectiveness of listening tools, some respondents say their organizations lack the human touch.

We use a lot of online techniques, which is good but missing some in-person depth. I'd prefer we use more camera-on sessions instead of text chat but that is out of budget usually.

No, it's become too digitally focused, we're losing in-person deep dives.

The tools are adequate with the exception of coding and understanding open-ended questions. No one bothers to have a person read them, which is really what you need to understand what consumers are saying.

Most text analytics fail at true understanding.

The tools are there. For us it is the brain that is missing. And the willingness to understand that people are not machines. **Q**

METHODOLOGY

The Q Report work life and salary and compensation study of end-client/corporate researchers is based on data gathered from an invite-only online survey sent to pre-qualified marketing research subscribers of Quirk's. The survey was fielded from May 24 to July 10, 2023. In total we received 1,969 usable qualified responses of which 707 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.17 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)

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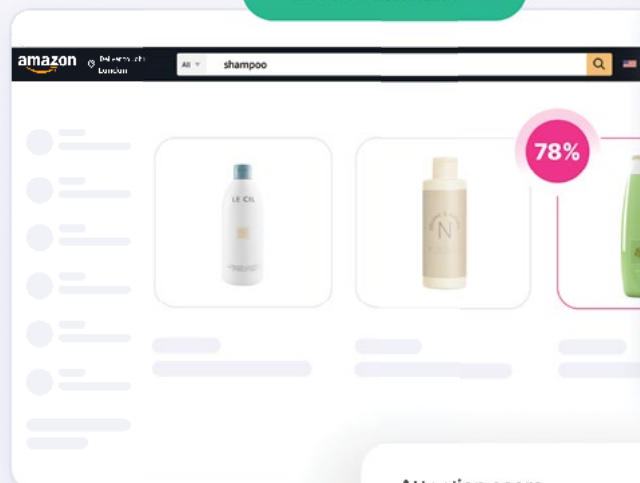
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Accelerate design cycles and reduce cost

AOI Performance

ENGAGEMENT

amazon · Delivery to London · All · shampoo

78%

85%

Attention score
88

2 hotspots

THE TRIALS AND TRIBULATIONS OF
IMPLEMENTING AI TECHNOLOGY

How one research agency navigated the challenges of automation

By Monika Rogers

I don't know about you, but every day someone is trying to convince me of the promise of their new AI tool, technology or service. It's not just messages in my inbox, it's the topic of most articles, webinars and conference presentations. While AI technology is the shiny new object, translating all those promises into reality can be daunting.

Rather than talking about specific AI solutions, I want to dive into the work of finding and implementing new AI technology. I'll start by sharing the automation journey we took at Illuminas, why some solutions succeeded while others failed, as well as team and process obstacles we had to overcome. I'll then layer in some additional complexities we encountered related to gen AI and offer my thoughts on the future of research operations as we shift to a whole new landscape of tech-enabled insight.

The story starts about two years ago after I sold my research tech startup and found my way back to consulting at Illuminas. I was excited that the company had built powerful research methods and was looking to accelerate adoption of AI and automation tools.
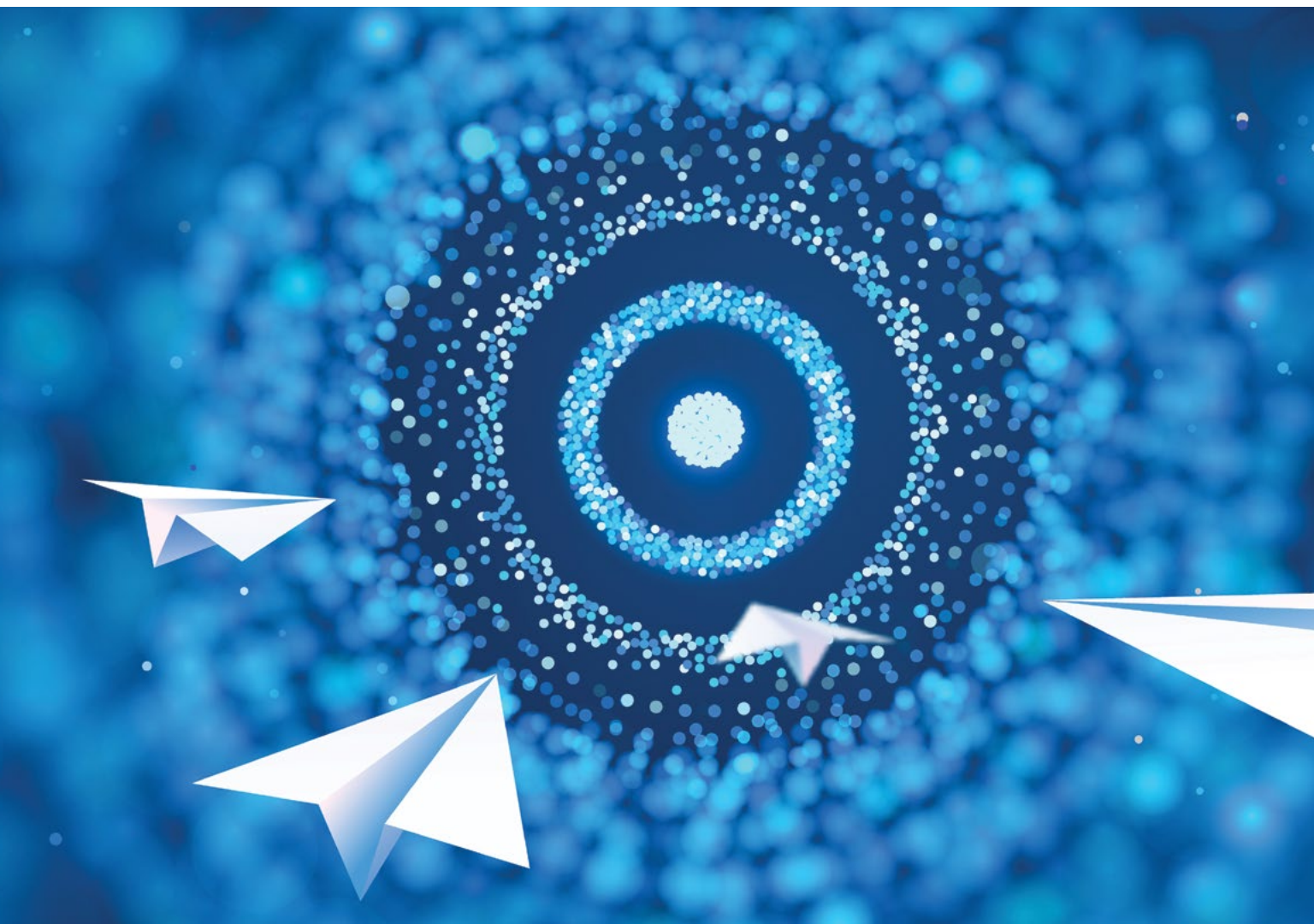
With more digging, I found that several automation tools had been explored in the past but failed to gain traction after investing in implementation. While there was strong interest in bringing on new AI technology, there was also quite a bit of concern regarding the potential for wasted time and effort of searching for, evaluating and implementing a tool just to have it ultimately be abandoned.

So, what sounded like one opportunity was really three: match the right AI tools to the right problems; build team confidence in operationalizing AI; and create a culture of AI innovation.

OPPORTUNITY NUMBER 1
MATCH THE RIGHT TOOL TO THE RIGHT PROBLEMS

Like most companies, Illuminas started its AI journey with a strategic planning session where leadership brainstormed the biggest problems and opportunities for the company. There were the requisite Post-its, whiteboards and voting dots. Ultimately two key themes emerged. The team wanted automation, particularly related to streamlining

analysis and reporting. And, the team wanted more agile processes, specifically ways to reduce cycle times and to complete project work more efficiently. There weren't resources to tackle both,

so the team decided to focus on automation and I was given the "Accountable" role in our RACI team.

Since this wasn't our first rodeo at automation, the first thing we did was
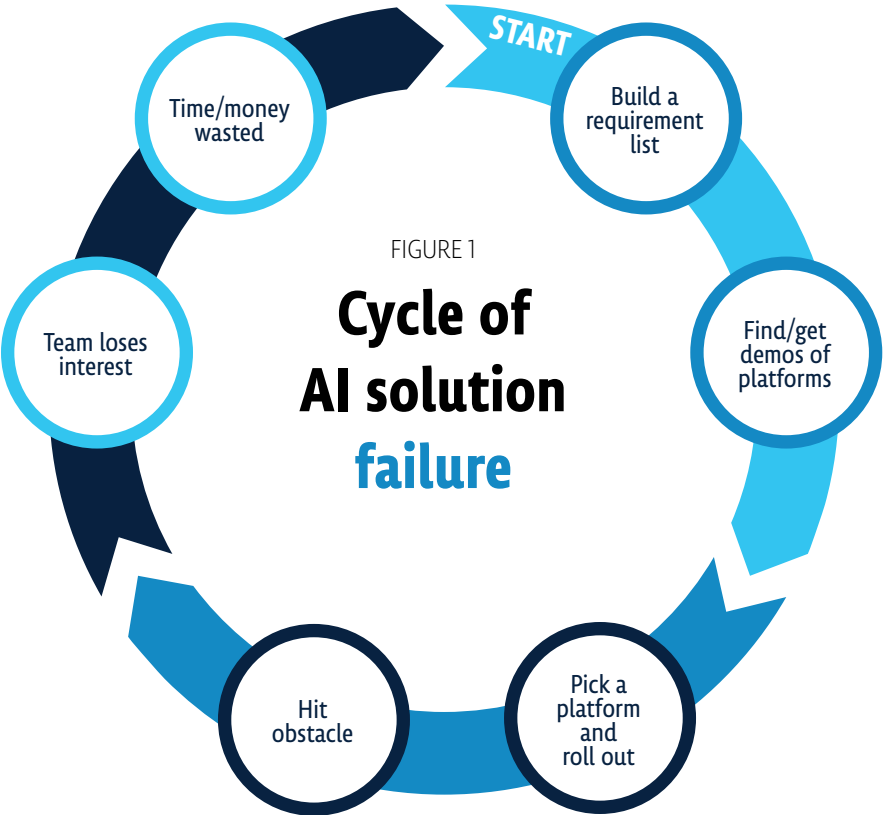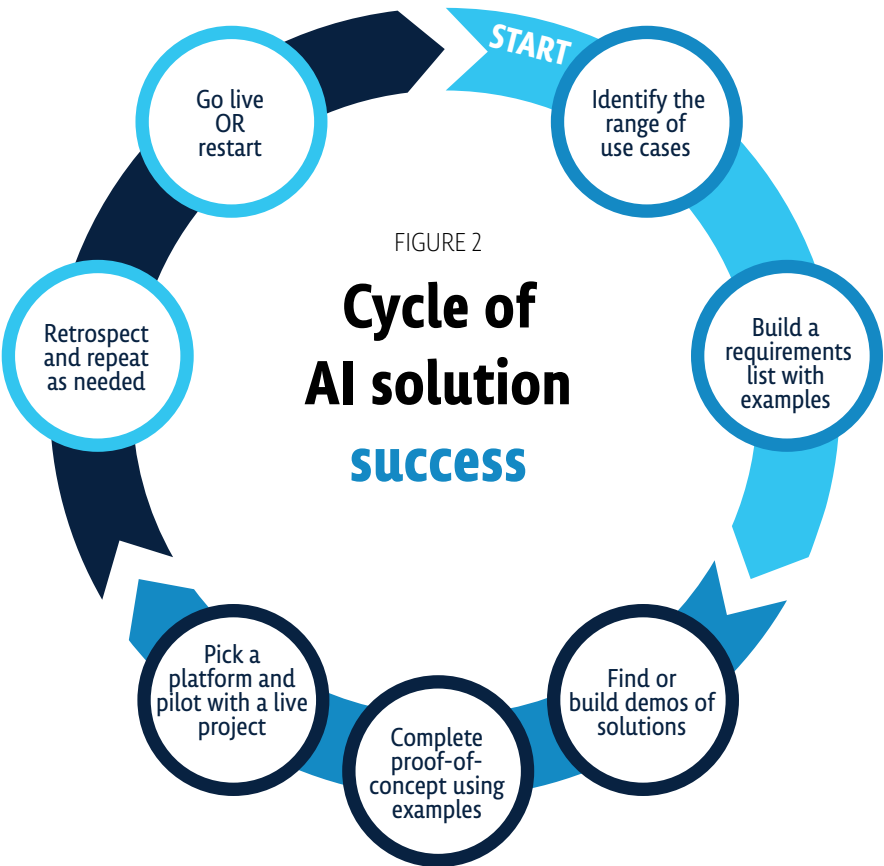

FIGURE 1

Cycle of AI solution failure

START — Build a requirement list — Find/get demos of platforms — Pick a platform and roll out — Hit obstacle — Team loses interest — Time/money wasted

FIGURE 2

Cycle of AI solution success

START — Identify the range of use cases — Build a requirements list with examples — Find or build demos of solutions — Complete proof-of-concept using examples — Pick a platform and pilot with a live project — Retrospect and repeat as needed — Go live OR restart

meet with folks in client services who had implemented new tools/approaches. After hearing one story related to the disruption that was felt after introducing a tool that didn't deliver to expectations, we discovered the cycle shown in Figure 1 that we all wanted to avoid.

Several hypotheses emerged on why the team might hit obstacles adopting new AI tools:

- The solution might be missing capabilities to fit the variety of work we do.
- The solution might be hard to learn, taking many more hours than expected to use.
- We might not have the right people/training to be successful with a new solution.

My own hypothesis was that potential issues would stem more from process than technology or the people on our team. In essence, we needed to minimize the "leap of faith" between demo and implementation that could increase the risk of failure. To avoid that, we put in place a process that allowed the team to preempt the ambiguity inherent in change. It changed how we approached problem definition and added multiple points where we could pivot based on results (Figure 2).

By adding an initial step to identify and segment concrete use cases, we were able to reframe the must-have requirements list. We split out requirements based on specific use cases and identified how various solutions spanned them. This step also helped us increase the range of solutions we considered. Seeing use cases with very specialized requirements, the team started looking beyond SaaS solutions to both in-house tools and outsourcing partners. Figure 3 summarizes the categories of solutions we considered, with the benefits as well as the risks.

Looking beyond SaaS subscriptions to custom solutions and contractors was a game-changer. When our marketing sciences team began to explore how they could leverage gen AI to build in-house tools, many new options emerged. They saw its potential not just to apply gen AI within the research applications but also to help write code for our own internal app development. In addition, once we started looking at contractors, they were able to help us navigate tool selection based on their

Choosing AI solutions

BUILD	SUBSCRIBE	CONTRACT
Frequent needs	Time/cost savings	Least control
Unique requirements	Better solution exists "off the shelf"	Less-frequent or lower ROI
Results in significant advantage	Current solutions not sustainable	Don't have skills or staff to implement
Requires skills and ongoing investment	Have skills and able to adopt/integrate	Requires expert strategy or guidance
HIGH	**MODERATE**	**LOW**
Control, IP	Acquisition/integration	Low switching cost

experiences across platforms. And they were some of the most effective at addressing complex use cases.

Ultimately, we ended up pursuing solutions in all three camps. Even though building an in-house AI tool was higher-risk, our team believed they could quickly get to proof-of-concept with in-house tools. So, while we were evaluating outside solutions, another team was simultaneously working through the same process but using iterations of our own AI tools. We made it through the proof-of-concept stage with six different solutions: two were our own apps, two were third-party platforms and two were solution providers who had services to speed up implementation.

OPPORTUNITY NUMBER 2
BUILD TEAM CONFIDENCE IN OPERATIONALIZING AI

Before I talk about the final implementation of AI tools, I want to circle back to talk about the team. The last thing they wanted was to get to the piloting part of the process and feel like we were asking them to learn a new tool without a high degree of confidence it was the right one. What we needed was in-depth input from those most directly impacted by implementation. But those experts weren't necessarily the champions that wanted to drive AI development. So, we put the implementation team expert skills to work in defining the use cases and providing detailed examples the AI team could reference along the way. Excitement and buy-in

started to build about solutions as the implementation team saw their input used when vetting new solutions.

The biggest test came when we moved from proof-of-concept to piloting on live projects, where we wanted to avoid hitting obstacles that would ultimately lead to implementation failure. Even with early team involvement and the use case-specific vetting we did, unexpected things still happened in the live projects. Here are a few examples of the variety of issues we encountered, primarily driven by unanticipated nuances that were specific to individual projects. For example:

- Data summarization that looked reliable in some languages faltered in other languages.
- Data visualization that worked for some data types didn't work for others.
- Data coding that worked for some open-ends didn't seem to generalize to all cases.
- Video analysis that worked for some videos faltered with captioning and longer videos.
- Auto-formatting that worked in proof-of-concept didn't extend to all studies or platforms.

Another related challenge came with the unique needs of internally developed tools. For these tools a wider range of issues emerged, such as UI optimization, device compatibility and the need for more sophisticated software testing and QA.

But the team felt these obstacles were manageable and persevered as

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we cycled through several iterations of pilots. Keeping the energy up hinged on the expectation that we wouldn't roll any solution out more broadly until we had ironed out most issues.

Our hard work paid off as we narrowed down to implementing three of the six solutions. The ones we rolled out were so wildly successfully they were ultimately extended to do the job of the three tools we walked away from.

OPPORTUNITY NUMBER 3
CREATE A CULTURE OF AI INNOVATION

Along with changing our processes and how we engaged the team to ensure successful adoption of AI tools, there were also several mind-set shifts that helped us succeed in building a culture of AI Innovation.

SHIFT #1: Be open to multiple solutions. We initially focused on finding a single solution that would work across many use cases. When we opened our options to using multiple solutions, it helped us see a better path forward. A good example is related to our report automation. We evaluated three solutions and rated each of them. They got us 50%, 80% and 95% of the way to meeting our needs. The solution that got us 80% of the way would work across nearly all our use cases, whereas a specialized contractor could get us 95% but on a more limited set of really challenging use cases. We ended up going with both solutions because the 95% solution saved us enough money and time to justify the additional investment for the 80% solution. The 50% solution was ultimately abandoned for all the right reasons.

SHIFT #2: Be open to revisiting solutions, as AI is evolving quickly. When we started our qualitative AI exploration, gen AI tools were just starting to emerge. We were fortunate to have a new VP of qualitative join the company and bring a proven tech solution. However, because this tool was slow to roll out new gen AI capabilities, we found limited time savings compared to our expectations. We continued to experiment with new gen AI solutions as they became available and to work with our marketing sciences team to train up our own models for coding open-ends. The realization became that even if we found a winning gen

AI solution today, the capabilities and tools available would surely be different next week. Fortunately, we found a startup that was interested in having us partner in development. Their ability to adapt quickly became even more important to our success. So, while we are using a home-run solution that covers 80% of our use cases today, we continue to test our own solution and other third-party tools as they evolve.

SHIFT #3: Process goals need to evolve along with solutions. All of the experiences above led me to this final insight related to operationalizing AI: The goal line keeps shifting. When I started at Illuminas, the mind-set was to have consistent processes that everyone could master so that we could continue to deliver "The Illuminas Way" to our clients as we grew. While this approach wasn't inherently wrong, as we adopted new solutions, nearly every one of our processes changed and the training documentation needed constant updating. And even more important, the belief about what we could achieve shifted as we discovered new and better ways of working. In other words, the goal line for operational success continued to shift (see Figure 4).

For example, automation of data entry changed our expectation from limiting rework to built-in accuracy. Enabling automated transcriptions and reporting did more than accelerate timelines, it enabled a different level of flexibility in delivering insights to clients. Building repeatable processes became less important than having specialists that can drive continuous improvement. And consulting became less about simplification and more about eliminating the toil and focusing on delivering better outcomes for clients.

OUR LIVES WILL BE DIFFERENT

There is no doubt as AI tools evolve and gen AI gets embedded across our tech stacks that our lives will be different. Those on the client side will be faced
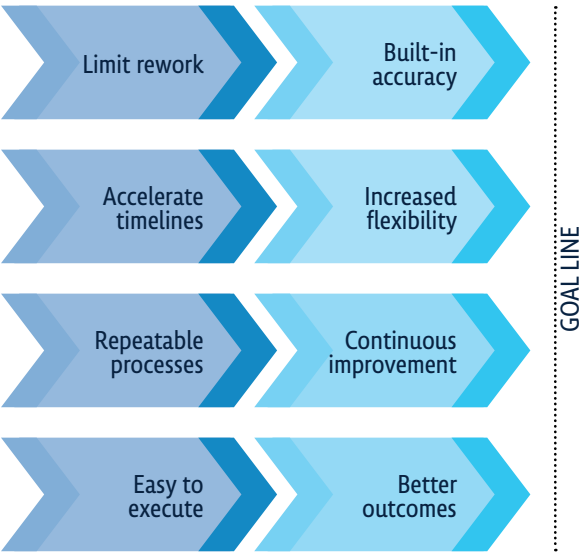
with differentiating your insights from those created by a chatbot or even embedding them into the chatbot. Those of you on the agency side will be faced with helping your clients navigate the speed of change and bringing them new ways of thinking and working.

While the story I shared started with goals of improving efficiency, clearly the larger opportunity is to build new products and services that drive growth and differentiation within the insights industry. The interesting part is that these outcomes are interconnected. Those agility goals we had set aside to work on automation ultimately became central to our success. And the outcome of driving efficiencies was the discovery we could use these same solutions to offer new solutions to our clients.

As you continue your own journey with AI technology, I'll leave you with this final thought: Whatever approach you are taking today to implement AI will likely be different tomorrow and the goals you have will continue to shift. But at the end of the day, the process of operationalizing AI is just as important as the technology itself. ⓞ

Monika Rogers wrote this article while serving as vice president of client services/operations at Illuminas. She is currently vice president growth strategy at CMB. She can be reached at mrogers@cmbinfo.com.

FIGURE 4

Shifting goal line for process improvements

Limit rework	Built-in accuracy
Accelerate timelines	Increased flexibility
Repeatable processes	Continuous improvement
Easy to execute	Better outcomes

GOAL LINE

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Promise or peril?

How to navigate the risks and rewards of using synthetic respondents

| By Raeann Bilow, Sean Campbell and Jack Bowen

abstract

Synthetic respondents potentially offer benefits like speed, efficiency and cost-effectiveness. Are they outweighed by concerns about bias, privacy and artificiality?

Market research is witnessing a significant transformation with the introduction of synthetic respondents or "synths" for short. These artificially created profiles are designed to mimic the human interactions typically encountered in market research studies. Crafted from extensive datasets that may include public records, targeted research projects and other relevant data sources, synths offer the potential to provide a more nuanced understanding of market dynamics.

Synths allow companies to gain deeper insights into their specific inquiries by simulating real human interactions within research initiatives. This approach supplements and enhances traditional methods of gathering feedback, aiding businesses in refining their marketing strategies, product development processes and overall strategic plans. However, the emergence of synths also raises potential concerns and risks associated with their use.

Below, we examine the advantages and challenges of using synthetic respondents in market research, highlighting both the opportunities they present and the risks involved. By adopting a balanced approach, researchers can effectively navigate the complexities associated with synthetic respondents and leverage them for maximum benefit.

REWARDS OF USING SYNTHETIC RESPONDENTS IN RESEARCH

Incorporating synthetic respondents as an augmentation to market research projects offers several benefits, including:

Enhanced preparation and refinement

Synthetic respondents offer a range of benefits in the pre-research phase of market research projects. To start, they help researchers with question development and refinement by generating an array of potential questions based on their research objectives. They can also be used to analyze ques-

tions for clarity, potential bias and their likelihood of eliciting meaningful responses.

For example, let's imagine that you want to conduct research on cybersecurity professionals and you have created a synthetic model that emulates their personality and response style. You can ask this model about their most common pain points, concerns, motivators or how they might react to different topics or questions. Based on their responses, you can refine and adjust the most pertinent questions to ask real respondents. And by testing different questions with the model, you can identify which ones elicit the most meaningful responses and identify any that might be problematic, unclear or potentially biased.

Synthetic respondents can also help to sharpen the study's focus right from the start, ensuring it zeroes in on the most pertinent and influential topics and target personas. Synthetic respondents, when utilized properly, can stand in as model profiles that represent ideal target audiences, incorporating factors such as demographics, interests and behaviors.

Finally, synthetic respondents can assist in refining the research methodology. Through preliminary interactions with synthetics, a researcher can experiment with various research designs, sampling techniques and analytical methods. This experimentation helps to identify the approaches that are most likely to enhance the study's outcomes, ensuring the research methodology is both effective and efficient.

Cost-effectiveness

Utilizing synthetic respondents in addition to traditional participants presents a cost-effective approach for conducting market research. By replacing a portion of human respondents with synthetic respondents, companies can cut down on the expenses tied to recruiting and compensating non-synths.

While there are initial costs involved in collecting the necessary data to develop synthetic respondents, this early investment can result in significant savings in the long run. By integrating insights from both synthetic and traditional respondents, businesses can achieve a balance, reducing research costs without compromising the quality and reliability of the data collected.

Speed and efficiency

Leveraging synthetic respondents allows for the rapid refinement of initial research concepts, facilitating the presentation of more refined ideas to human participants. This ensures that the concepts being tested are not only well-developed but also sharply focused. In essence, synthetics give researchers a laboratory of sorts to experiment within, safely and appropriately and in ways that enhance the entire research effort from start to finish.

This leveraging of a laboratory full of synths can result in a streamlined research process, leading to faster completion of research projects and faster access to critical business insights.

Engaging presentation of findings

Synthetic respondents can transform the analysis and presentation of research findings into a more dynamic and engaging process, moving beyond the constraints of traditional methods such as slide decks or reports.

For example, synthetic respondents can be generated at the conclusion of a research study, with their profile based on the data and insights collected to date. Doing so allows a set of stakeholders to "chat with the data" in paradigms that are becoming more familiar each day as organizations and individuals embrace technologies such as ChatGPT. Ultimately, by engaging with synths after a research effort is complete, stakeholders can better understand the nuances of the data and explore various outcomes based on questions that may arise weeks or months after a traditional readout.

RISKS ASSOCIATED WITH USING SYNTHETIC RESPONDENTS IN RESEARCH

While using synthetic respondents in a market research study offers numerous benefits, it also comes with risks. Researchers need to be aware of:

Avoiding bias introduced by synths

Relying too heavily on synthetic respondents can compromise the integrity of traditional market research, risking biased results. Recent tests[1] revealed that synthetic respondents exhibit biases and lack the diversity and subtlety found in qualitative and quantitative analyses.

Therefore, it is crucial to corroborate synthetic findings with real human feedback and quantitative data. This cross-verification process is essential to enhance the accuracy of research outcomes and reduce bias, ensuring that the insights derived are both reliable and representative of the target population.

Diversity, equity and inclusion

AI models can exhibit biases due to the origins and composition of their training datasets, which are frequently not transparent. When these datasets fail to comprehensively represent a diverse array of demographics, cultural backgrounds and behaviors, the AI's outputs can be biased, leading to skewed outcomes.

An example of this issue is the use of the Common Crawl dataset for training large language models (LLMs). Common Crawl, a vast dataset collected from the internet, is a popular source for training AI due to its size and breadth. However, its composition reveals significant imbalances in language representation; for instance, English content makes up approximately 45% of the dataset, while Polish, among other languages, constitutes less than 2%. This disparity in language representation can result in AI models that are more adept at understanding and generating English content, potentially marginalizing non-English languages and the cultures associated with them.

Without deliberate efforts to include a broad and representative range of data, AI systems risk perpetuating existing biases and creating outcomes that do not fairly or accurately serve the global community.

Privacy and security concerns

When synthetic respondents are trained on LLMs, there is a risk of accidental inclusion of private or NDA-protected data into public datasets. If that confidential information is inadvertently incorporated, it can lead to breaches of confidentiality, legal and financial repercussions and concerns about data integrity and security.

This is particularly concerning for businesses and individuals who entrust sensitive data to systems that utilize synthetic respondents. The unauthorized disclosure of private information can damage relationships, tarnish reputations and lead to a loss of trust in the entity responsible for the data breach.

To address privacy and security concerns, it's essential for organizations to implement stringent data governance and security measures. This includes conducting thorough data audits, anonymizing personal information and ensuring that the data used for training synthetic respondents is devoid of sensitive content. Moreover, it's critical that organizations creating synthetic users maintain ownership or at least control over the models produced. This control ensures that the synthetic respondents can be managed, updated or corrected in alignment with evolving data privacy standards and organizational needs, thereby safeguarding the integrity and confidentiality of the data involved.

Predictive limitations

Synthetic respondents, by their nature, cannot experience the present moment as humans do, which may limit their ability to forecast future trends accurately. Unlike real human interviews, which can address emerging issues that might have happened as recently as today, synths may not be able to meaningfully comment in these scenarios.

This limitation is partly because synthetic respondents tend to be based on models that rely on historical data, which inherently cannot include the very latest developments. For example, as of the publication date of this article, systems similar to ChatGPT would not have access to information or trends that emerged after that time.

Jeff Bezos once emphasized the significance of anecdotal evidence over data when predicting future trends, stating, "When the data and anecdotes disagree, the anecdotes are usually right." This perspective underscores the value of obtaining human experiences that are based in the present and close observations of these experiences in real time.

Moreover, most LLMs, including those capable of processing text and images, still fall short of the human ability to integrate a wide range of sensory inputs – such as audio, vision, touch and spatial awareness – into their understanding and their training data sets. This highlights a fundamental gap between synthetic respondents and human experiences. While synthetic models can provide comprehensive analyses based on extensive datasets, they lack the depth of perception that comes from direct, multisensory engagement with the world.

NAVIGATING THE RISKS OF USING SYNTHETIC RESPONDENTS IN MARKET RESEARCH

Employing synthetic respondents in market research offers innovative opportunities for data collection and analysis. However, to effectively navigate the associated risks, researchers must adopt a comprehensive and cautious approach. Below are key strategies to mitigate these risks:

Combine research methods

Combining both synthetic respondents and traditional research methodologies is crucial for a balanced and comprehensive analysis. This hybrid approach allows researchers to leverage the efficiency and scalability of synthetic respondents while grounding their findings in the rich, nuanced insights that traditional research methods provide. By doing so, researchers can achieve a more accurate and holistic understanding of their subject matter, ensuring that the insights gleaned are both robust and reliable.

Assess outputs critically

Researchers must critically evaluate the outputs generated by synthetic respondents, especially in areas where bias is likely or data diversity may be insufficient. This involves a thorough

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examination of the assumptions underlying the synthetic models, as well as an assessment of how well the data represents the target population. By scrutinizing the results for potential biases and gaps, researchers can identify and address any distortions or oversights, ensuring that the conclusions drawn are valid and reflective of reality.

Ensure transparency and traceability

Maintaining transparency and traceability in the responses generated by synthetic respondents is essential for accountability. Researchers should ensure that each response can be traced back to its underlying data sources, allowing for a clear understanding of how conclusions were reached. This level of transparency not only bolsters the credibility of the research but also enables other researchers to replicate or challenge the findings, fostering a culture of openness and rigorous inquiry.

Respect the limits of synthetic users

It's important to acknowledge that synths are tools that enhance, not replace, traditional market research.

They offer significant advantages in terms of efficiency and can handle large volumes of data with ease. However, they lack the depth of understanding and the ability to capture the full spectrum of human experiences and emotions that traditional methods, such as interviews and focus groups, can provide. Researchers should leverage synthetic respondents to complement and enrich their research efforts rather than viewing them as a stand-alone solution.

Consider the analogy of computer-based computational tools used in drug discovery. These tools, which simulate new molecules, have become an invaluable asset alongside traditional experimental methods. They streamline the drug discovery process by refining and narrowing down the hypotheses that need to be tested in actual trials. Similarly, synthetic respondents act as a preparatory tool in market research. They help ensure that researchers are asking the right questions and focusing their real-world studies efficiently, thereby complementing the traditional research process. Just as in silico models do not replace the need for

real-world testing in drug development, synthetic respondents should be seen as a means to enhance the depth and relevance of market research findings.
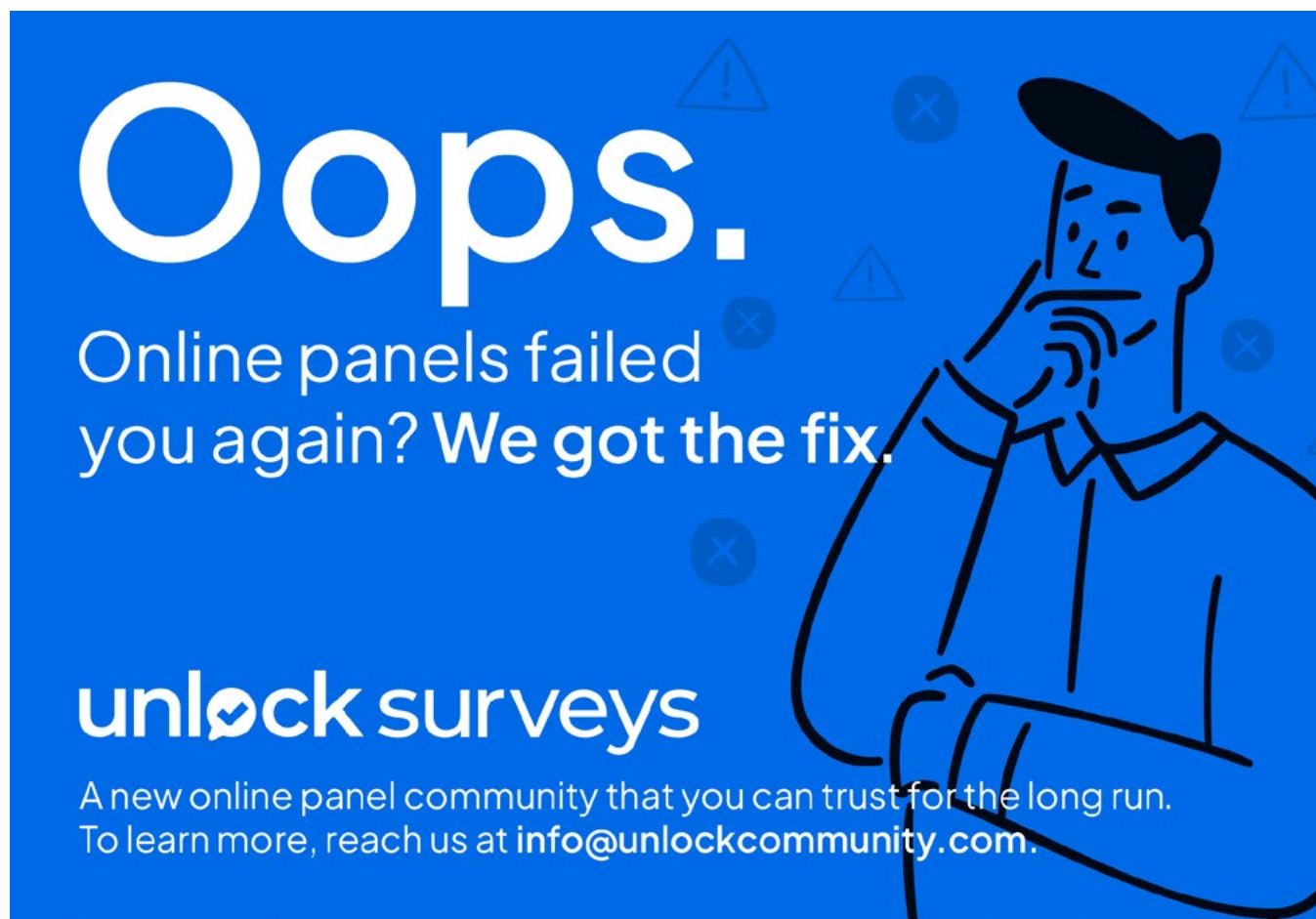
Transforming market research

Synthetic respondents are rapidly transforming market research efforts. Researchers who skillfully embrace synths while ensuring their limitations are well understood are positioned to provide critical insights for their clients today and long into the future. When leveraged safely and effectively, synths can jumpstart our understanding and in no way should be seen as a threat but rather as a meaningful complement to traditional research methods. Ⓞ

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REFERENCE
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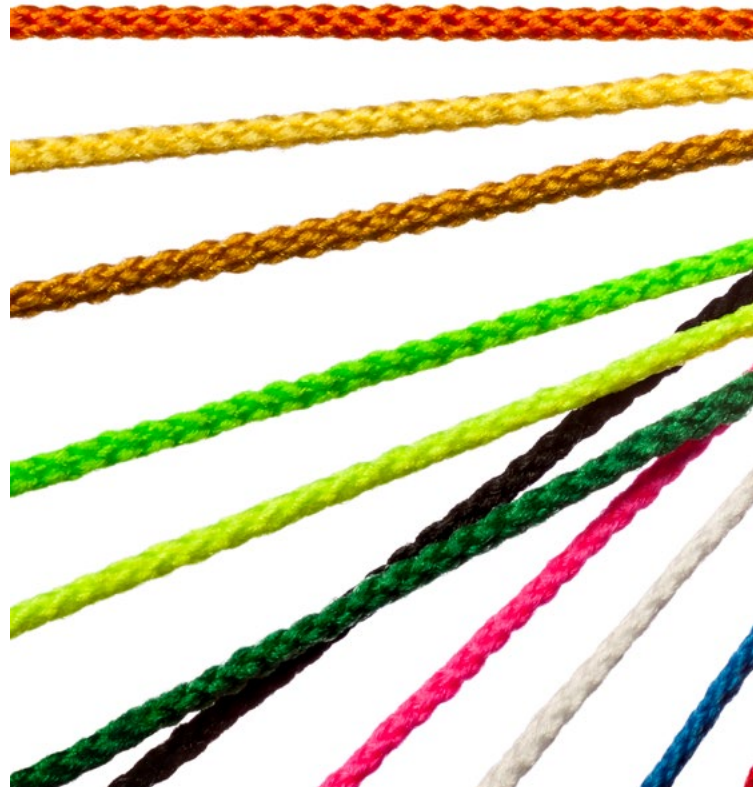
Moving beyond the helplessness

Study looks at how German citizens are using collective action to reclaim a sense of agency

| By Patricia Sauerbrey Colton

abstract

In-depth interviews and a quantitative survey investigated the psychological impacts of political and social unrest in Germany, echoing similar happenings in the U.S.

Isn't a little dose of relief something we all yearn for? Amidst a relentless onslaught of crises, maintaining a sense of control has proven daunting. The pandemic, climate change, wars, migration, radicalization, inflation and more have left many feeling overwhelmed, uncertain where to start or retreating to the safety of our inner circles. The crisis-laden new norm has numbed us, driving us into autopilot to shield what remains intact of our daily lives. Reality seems to have become "too much" to cope with while experiencing a shrinking radius of impact of personal efforts.

These developments sparked my curiosity about potential beacons of hope: Could there be signs of dynamics that interrupt this vicious cycle? In this article I will share findings from a January study conducted in Germany by Rheingold, a qualitative-psychological market research institute, which shed light on the psychological benefits of reclaiming control.

Despite the varied impact of individual crises worldwide, the psychological underpinning in both the U.S. and Germany is strikingly similar. Both nations are grappling with a mental impasse, craving greater solidarity and connection in an era marked by polarization and retraction into personal bubbles. The political impacts have been radicalization and the solidarization with increasingly extremist ideologies that help reinstate some control in opposition and unity with like-minded people. In Germany, this is reflected through the growing popularity of the right-wing AfD party while in the U.S., far-right positions attract rising numbers of voters.

In November of last year, right-wing extremists, including members of the AfD party, clandestinely convened in Potsdam, Germany, to deliberate a "master plan of remigration," a scheme to deport asylum seekers, residents with permits and "non-assimilated Germans." Exposed by investigative journalists in January 2024, this revelation ignited outrage and protests among Germans who saw history repeating itself.

Subsequently, Rheingold conducted in-depth interviews with 26 participants and a quantitative survey of 1,061 Germans, aged 18 and older, to investigate the psychological impacts of these demonstrations. The findings bear a striking resemblance to developments in the U.S.

A stark wake-up call
Germans' trust in the government has waned, primarily due to incessant disputes within the current tripartite coalition: 70% (top-two boxes) believe this discord has bolstered the AfD party's popularity. The secretive extremist meeting served as a stark wake-up call, rousing many from collective despondency and passivity. Democracy and human dignity became rallying cries, uniting a diverse population in a common cause. Sixty-seven percent viewed the protests as a clarion call for politics as well, with the demonstrations unleashing previously constrained energy, now redirected towards achieving more agency, personal and political unity. Sixty-one percent felt the protests signaled a transformative shift in Germany, with media coverage affirming their impact and the grassroots movement's validity.

Fostering unity in opposition
Participation in a like-minded community provided a political identity distinct from the contentious government, comprised by a tripartite coalition. The demonstrations encouraged dialogue with diverse protestors, bolstering a sense of unity despite differences. A significant portion of participants and supporters aspired for the movement's continuation, hoping it would spotlight additional political grievances. Twenty-nine percent expressed a desire for further protests against radical right ideologies and in defense of democracy. However, some of the empowering and comforting effects of the protests dissipated upon returning to the routine crisis-

laden life. The study revealed a palpable desire for a political echo: "Our protests have eased the government's burden; now, it's their turn to act." The societal implications of the protests left Germans divided between hope and concern: 62% fully or mostly agreed that the protests facilitated societal dialogue, whereas 47% believed they exacerbated societal divisions.

Reassess their flirtation
The protests' impact on AfD sympathizers varied with their level of party affiliation.

Undecided voters, exploring conservative to right-wing ideologies, felt compelled to reassess their flirtation with the AfD, hesitant to sever ties with democratic centrism. They were deterred by ideologies they deemed excessively radical, yet were not entirely disillusioned with the AfD, hoping for a moderation of its more radical positions.

Prospective AfD voters, intending to protest the current government's policies, felt alienated by the anti-AfD sentiment of the protests, viewing it as a personal affront. Yet they remained hopeful of sending a warning message to the government by supporting the AfD and inciting unavoidable societal discord.

Convinced AfD voters remained skeptical of the protests evolving into a significant movement, interpreting media coverage as evidence of media collusion. Feeling marginalized and overlooked in their daily struggles, they identified their adversaries within the established political parties, aiming to confront a seemingly aloof elite.

Willingness to engage
The protests underscored the desire for deeper social connections among democracy advocates and showcased a collective willingness to engage actively. Germans sought recognition from the government and support for their movement, yearning for a direct acknowledgment of current challenges and an inclusive approach to problem-solving. They desired not mere placation but leadership that courageously identifies issues and propels collective action. The interviewed Germans emphasized the potential for the government to model greater cohesion and more effective conflict resolution within the coalition, while also recognizing the critical role of politics in fostering a civil discourse that embraces diverse viewpoints, thereby averting further division.

Broader contexts
The outlined study results directly apply to the referenced German protest context but also, given the parallels with the societal climate in the U.S., provide a thought-provoking example

to extrapolate principles and hypotheses applicable to broader contexts of adversity.

- The persistent crises have nudged us towards a state of learned helplessness and the associated passivity and resignation. This psychological condition is marked by the belief that one has no control over the outcomes of their actions due to repeated exposure to uncontrollable negative events or prolonged periods of stress, failure or trauma. Sound familiar? To be at the mercy of the various crises has made us generalize our lack of control, especially on a larger scale beyond our personal bubbles.
- Our threshold for action has risen. Circumstances that might have previously spurred us to voice our concerns now seem insurmountable, often preemptively dismissed as futile efforts. We are challenged to see an issue at hand while being overwhelmed by the myriad problems it may be embedded in. In Germany, the extremist ideologies of the AfD were known well before the protests yet it took a provocative reminder of historical patterns to catalyze action.
- The referenced protests show some resemblance with the first steps out of a depression. Early signs of recovery from a depression are typically renewed interest in connecting, getting moving and finding meaning in everyday activities, resulting in

stepwise successes and a heightened sense of control. The protests appear to have sparked a shift in mind-set, from passive acceptance to recognizing opportunities for empowerment and the emotional rewards of active participation. This shift not only lowered the threshold for mobilization but also demonstrated that collective action can initiate a domino effect, inspiring movements such as Black Lives Matter.
- With the rise of the threshold to protest comes the explosivity of the bottled-up, multilayered and ongoing frustration. Once this energy is released, peaceful protest can easily flip into outbursts of antagonism and violence, as witnessed around some of the demonstrations accompanying the war in Gaza.
- Ideally, taking action fosters a dual sense of unity in purpose and an appreciation for diversity within the collective, illustrating that differences among participants can coexist with a shared human experience. This recognition can serve as a potent force for inclusivity and the celebration of diversity.
- Protests may engage undecided or moderate individuals and encourage reassessment of extreme positions. On the other hand, protests may amplify the challenge of reaching those deeply entrenched in their views. This underscores the importance of nuanced approaches in political

discourse and activism, aiming to engage rather than alienate and ideally opening doors for civil discourse modeled by politicians.
- Engaged groups, cognizant of their influence, aspire to see their advocacy inspire others in the short term, as exemplified by movements like Fridays for Future. Protests offer a platform for political engagement, signaling a deep desire for acknowledgment and participation in democratic processes, leveling the field across socioeconomic statuses.
- The aspiration to effect foundational, long-term change carries the risk of disappointment. Initial steps out of learned helplessness might revert to disillusionment without sustained impact. However, patience and repeated positive reinforcement of the connection between action and impact breaks the instilled pattern and can lead to an awakening sense of reclaimed agency, as expressed in the example through the longing for the reward of being seen and inspiring change.
- The helplessness state and the increased threshold to take action need significant counterbalancing by feelings of empowerment, unification, celebration of diversity and inspiration of others. While activism may temporarily disrupt the cycle of learned helplessness, sustaining this momentum requires repeated catalysts to inspire broader, more frequent and more inclusive movements that cannot be ignored by the government. This could not only trigger a temporary uptick in relief but prompt longer-term confidence in a more positive future.

I extend my gratitude to my German colleagues, Birgit Langebartels, client director, and Stephan Grünewald, Rheingold founder and managing partner, who spearheaded the study. The study's insights have not only illuminated the power of collective action in Germany but also offered valuable lessons for navigating the complexities of our current global landscape. Ⓠ

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Shorten the screeners, lose the grids

Real answers from real respondents on how to create better B2B surveys

| By Scott Worthge

abstract

A research-on-research study on the pain points for B2B survey participants found that valuing the respondent's time might be a key path forward for boosting response rates.

As any researcher can tell you, response rates for online research, particularly surveys, have been declining for decades. I've been involved in "panel and sample" for over 30 years and this issue became more acute a few years ago – a "sample shortage" that the market research industry hadn't seen previously. Potential participants weren't responding as they had, for a host of reasons I could expound on at length. But the upshot was that fewer people were taking the online surveys researchers needed them to complete, affecting suppliers and clients across the market research landscape.

What started those few years ago continues today. This issue affects business surveys for B2B audiences more than B2C consumer surveys, given the smaller and more specific populations that are available for participation. One research industry exec nailed it, saying, "If B2C is drawing from an Olympic-sized swimming pool of potential respondents, business surveys are working with a kiddie pool – and sometimes a fishbowl – to find the people critical for participating in research and generating the data for generating insights." Meanwhile, demand for business survey participants increases consistently, especially for higher managerial decision-makers and specialist target audiences such as information technology decision makers (ITDMs).

I have a vested interest in understanding and motivating B2B respondents, given Quest's focus on providing such audiences for our partners' research projects. In researching declining responsiveness, I found lots of articles, blogs and even webinars offering advice about participation in B2B surveys. So many researchers weighed in with their opinions about what made for a good B2B survey, from the incentives necessary and appropriate for gaining cooperation from potential respondents, to survey length, question types and so on.
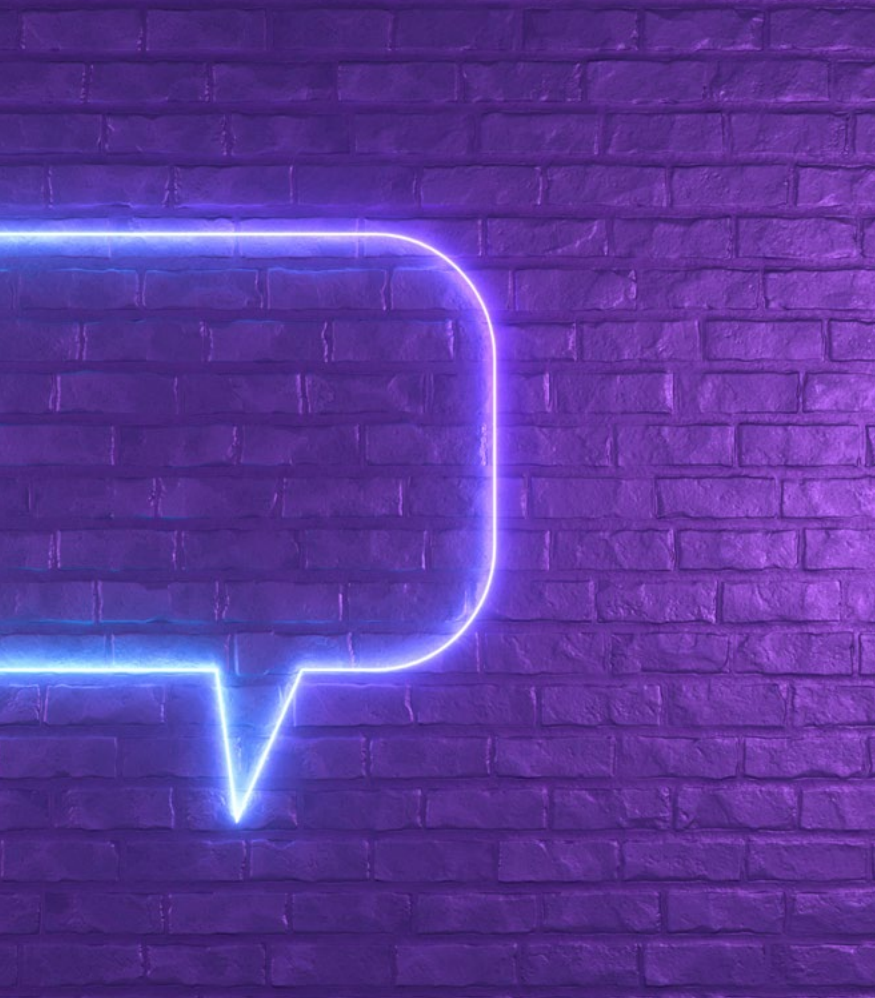
What I didn't find was research-on-research asking actual business audiences about what would create more motivation and better engagement for them – what they as B2B survey-takers like/don't like, want and need in order to participate more frequently, willingly and authentically. Lots of opinions about these business professionals? Absolutely. Actual data from someone surveying them directly? Nowhere to be found.

Looking for answers, I designed Quest's own investigation among several highly in-demand B2B audiences (based on the hundreds of B2B surveys we field each month). After all, who better to comment on what will increase B2B survey motivation and participation than the people who are asked to take those surveys? What we built to investigate this issue was a survey of several B2B groups:

- small business owners and general managers (with fewer than 50 employees);
- mid-level managers and directors;
- higher-level management – AVP, VP, SVP;
- tech specialists – ITDMs, IT influencers;
- non-tech, non-management "regular workers."

We surveyed 80 of each group, 400 total, in Q1 2024 with quotas across these for company size (small, mid-sized, enterprise) and geographic balance by U.S. Census region. We didn't impose quotas for line of business, figuring this would be too granular for our exploratory work and the per-group sample size selected. The respondents were a mix of members of B2B online panels, expert networks and non-members of either, accessed through intercepts.

What we were really after was the identification of pain points – where their typical experience with a B2B survey caused them to wince

(figuratively or perhaps literally), complain, even consider or actually drop out of a survey. We asked for their de-motivators, distractions, dissatisfaction and even disgust. While we were careful not to bias the results negatively with how we asked, we explored the entire process of taking a B2B survey from the invitation to the wrap-up and incentives provided.

What did we learn from our exploration? Much that we expected but with several distinct surprises. I've been involved in online surveys since that methodology emerged as the predominant data collection approach in the late 1990s, increasingly supplanting telephone interviews. I found several topics we asked of our respondents where their clear answers weren't intuitive for me. And I was chagrined if not embarrassed that I as a long-time researcher didn't know better what my survey-takers wanted!

Let's dig into the results, which are a summary of what was presented at the Quirk's Dallas conference in February 2024. While the survey provided a volume of data, we'll highlight the more notable themes for each of our major areas of inquiry.

"What are the top motivators for you to take a B2B survey?"
"Making my opinion known/heard" was the top result. This was particularly strong for smaller companies and lower-level employees.

A close second place was "compensation" – a direct incentive paid in cash or a cash equivalent such as a gift card or code.

The tech crowd was particularly motivated by "exposure to new ideas" and "gaining information helpful to my role," but other groups in general weren't very interested. I thought this might be stronger across the board.

The losers for motivation generally were "non-cash incentives" and "competitive info to help my company."

"What pain points have you had in business surveys?"
The big answer here was "screening and qualifying questions." This was a surprise to me for how strongly all our respondents felt the screening experiences they had were too long, too general or not relevant enough and just plain "missed the mark." Comments such as "ask me what I know and what my responsibilities are" and "stop relying on my title" were typical.

The time needed for screening and qualifying was a huge point. Respondents felt very strongly that screeners needed to "get to the point quicker," asking more direct questions and fewer of them.

This pain point was three times more important than anything else – certainly an aspect of B2B survey-taking that merits scrutiny and more attention by sponsors of such surveys.

Very close to this as a pain point was "confusing or bad survey design." When talking to clients about data quality, this issue comes up often – what we ask and how we ask our respondents as researchers needs review and evolution. I won't get on my soapbox about training in survey design but this was a consistent deal-breaker. "I can tell when the questions are written by someone who doesn't know my industry" sums up the sentiment behind this dissatisfaction and it was a significant cause for those who said they would drop out of a survey that showed naivete about the topic under discussion. Top execs and tech audiences were particularly sensitive to this.

Interestingly to me, "survey invitations" didn't come through as a pain point – 85% of our sample basically said "no problems here." I had hypothesized that how an invitation was worded, how it portrayed a survey opportunity to a potential respondent would be more of an issue, but evidently not, at least in our sample.

"What kind of questions during a survey bother you?"
I was expecting "open-ends, hate those" and we did get that sentiment. Aren't open-end questions universally disliked? How many is too many is up for debate still but one we have in mind for future investigation.

Disliking open-ends wasn't nearly as strong as the outright hatred of "big grids, with forced responses" – this jumped into first place among our sample, with comments such as "Why ask for so much detail?" and "Why can't you narrow down a long list to what's relevant to me, then ask all your questions?" I'm rethinking how I present grids for my clients, based on the strength of what I heard here.

Another of the most objectionable question types was what I call "work

PII" – asking for personally identifiable information about the specific job and company of the respondent. Often enough in B2B surveys I see questions asking for the respondent's work e-mail address or LinkedIn profile, or their company name and/or specific location. This is a deal-breaker for the respondents we asked, especially middle managers at larger companies. They felt if they provided such information, their responses wouldn't be anonymized and likely would be used for purposes other than research. Comments like "Why would a survey need to know my LinkedIn?" and "No way will I tell who my employer is by name. Then my comments could be traced back to me easily" exemplify the tone expressed. I can understand questions such as these being asked for validation of respondents, especially for more specific B2B audiences. But respondents felt very strongly that any questions needing to establish their qualification for a survey should be upfront and based on their knowledge and experience, not their personal and company identification. "Why care about who I work for? Shouldn't surveys be asking if I sit in the right chair and make decisions they want to ask about?" sums it up.

I was interested to find out what information our respondents felt they could share, that they considered non-confidential. These included "customer makeup," such as the amounts that are wholesale vs. retail, or domestic vs. international. They also indicated a willingness to share purchase stage for types of products and general budget – they didn't object to being asked where in a consideration-to-purchase sales cycle they were for, say, HR management software, and what they were budgeting for that purchase overall.

"How long is too long for a business survey?"
The age-old question of length-of-interview, right? As a researcher I rarely push back too hard on clients who tell me they have a 20- or 25-minute B2B survey. But I've never had guidance for what happens at those survey lengths to say anything concrete and advise differently.

Our respondents were clear: Their cooperation peaked at 15 minutes. Up until that time, only 20% of our

respondents would consider dropping out of a typical B2B survey and most said they would almost always "stick with" what they started. But after those 15 minutes, their cooperation fell off a cliff – at 20 minutes almost 60% said they would be ready to drop most surveys and at 25 minutes this rose to 75%. Three-quarters of a typical B2B survey audience is disengaging at 25 minutes?! Ouch. Small business owners were the strongest for this sentiment, saying "The time I spend in a survey is the time I'm not running my business. I'll give only so much."

This bears looking into and will be an aspect of B2B surveys Quest investigates further in 2024 and likely into 2025. We had done a similar B2C investigation a couple years ago into what we called data degradation, our name for what type of data suffered what declines in quality and reliability at what point in a typical consumer survey. We want a more definitive answer here than "don't go past 15 minutes," so we'll be digging into this in future research-on-research.

Next up: incentives
I haven't addressed here several very important questions about incentives for B2B surveys. We asked specific questions about expectations and reality for incentives our respondents had been offered in past B2B surveys. We received a lot of important information on what they deem appropriate types and amounts of compensation. I'll be bringing that information to you in a future article, given it's a separate and focused discussion unto itself that deserves more than a few paragraphs here.

Quest and I hope that showing the results of our recent survey of U.S. business professionals will provide insights and advice for researchers of all types. Our purpose in developing and providing this information is for all of us to gain a new understanding of B2B audiences and reconsider how we approach creating and conducting B2B surveys. We welcome comments and collaboration as we dig into B2B best practices and share what we find. ⓞ

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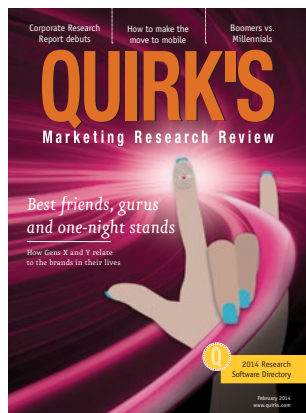
Mobile wallets hit the market

Most of us don't intentionally leave our credit cards behind but the fear of a forgotten wallet may be a thing of the past. With more restaurants and shops normalizing mobile wallet and QR code payments, a physical card is becoming less necessary. The 2014 article "Why the credit card industry will never be the same again," accurately predicted that the mobile payments market would explode, stating, "The next battleground where credit card giants will scuffle will still be found in your pocket; interestingly it's not your physical wallet but rather your mobile one."

Point-of-sale technologies were becoming more common then and are even more popular now. Millennials took the lead in mobile payment usage with 39% having already used their mobile phone to make a payment. "As a result, the growth of mobile commerce means that mobile payments will eventually go mainstream," the article posited.

2014

Attracting Millennial consumers

Gen Z research is on the rise today however, Millennials were all the buzz in 2014. In the article "How Gens X and Y relate to the brands in their lives," Jo-Ann Osipow and Kathy Sheehan looked at research targeting Millennials and how they compared to Gen X. When looking at product and brand expectations, Millennials prioritized customization, self-expression and authenticity.

In the same issue, the article "Strategies for reaching Millennial and Boomer shoppers" listed five ways to engage Millennial shoppers. To boost engagement among Millennials, marketers were told to play to the positive, optimize digital media for smartphones, have a shopper marketing strategy, offer blogs, reviews and chats as part of their digital offerings and recognize that Millennials are a diverse group.

Relevant then, relevant now

Many things have changed in the past 10 years but some trends have stayed the same. The In Case You Missed It column shared four CX trends for 2014 from LivePerson's The Connected Customer Blog. The article emphasized the importance of leaving room for improvement, stating, "Consumers are quick to look elsewhere when they feel their expectations are not being met." It also established that brand trust and loyalty and speed and efficiency are crucial.

Understanding the last trend listed, high-impact moments, could help determine when consumers need assistance. Thirty-five percent of consumers indicated that they needed help or support at the moment of purchase. "Identifying the key moments where consumers may require additional support during their digital journey is essential."

A decade of the Quirk's Q Report

Quirk's announced its first annual Corporate Researcher Report in the same 2014 issue. Renamed The Q Report in 2017, it offers corporate researchers an in-depth look into their world, helping them learn more about what their peers and colleagues are doing. The Q Report covers research methods, work life and salary and compensation.
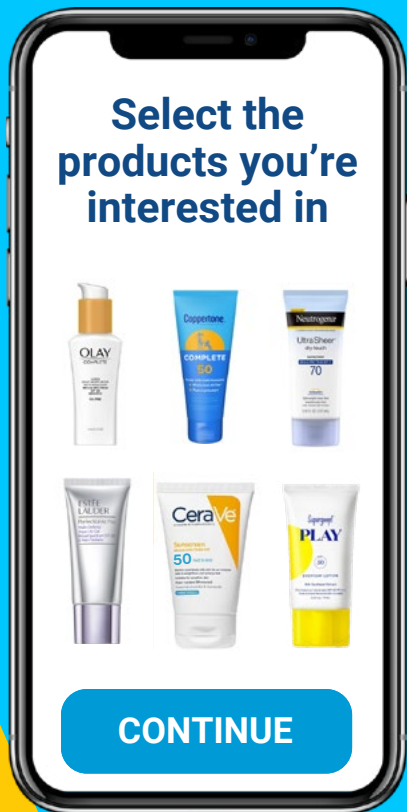
Throughout the years, Quirk's has collected information to be shared and compared to see how the marketing research and insights industry has changed. The 2024 Quirk's Q Report will be published in the September/October 2024 issue. To view previous Q Reports visit www.quirks.com/tools/corporate-researcher-report.

Scan to access all Quirk's back issues.
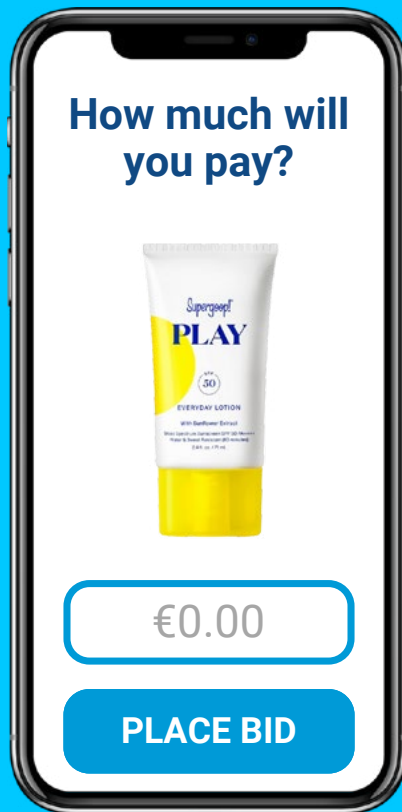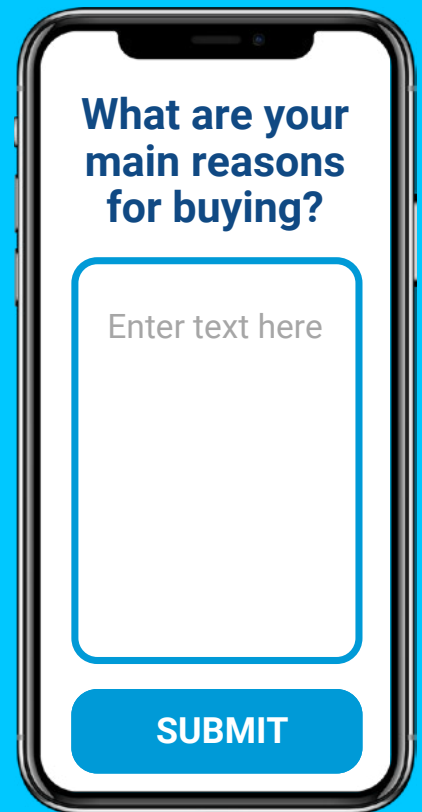
CALENDAR OF EVENTS

••• can't-miss activities

IQPC will host CDO Retail Exchange on **July 10-11** in **London**. Visit www.aidataanalytics.network/events-chief-data-officer-exchange-retail.

NRF will host NRF Nexus 2024 on **July 15-17**. Visit nexus.nrf.com.

Quirk's Media will host The Quirk's Event – New York on **July 17-18**. Visit thequirksevent.com/new-york-2024.

Customer Management Practice will host Customer Contact Week Asia on **July 16-19** in **Singapore**. Visit www.customercontactweekdigital.com/events-customercontactweekasia.

Relx will host the Online Retailer Conference & Expo on **July 24-25** in **Sydney**. Visit www.onlineretailer.com.

WAPOR will host its Annual Conference on **July 28-31**. Visit wapor.org/events/annual-conference.

Corinium Global Intelligence will host CDAO Chicago on **August 7-8**. Visit da-metro-chicago.coriniumintelligence.com.

WBR will host eTail Boston on **August 12-15**. Visit etaileast.wbresearch.com.

AMA will host the Summer Academic Conference on **August 16-18** in **Boston**. Visit www.ama.org/events/academic/2024-ama-summer-academic-conference/.

The Research Society will host the Human Insights Conference on **August 29-30** in **Sydney**. Visit www.researchsociety.com.au/events/conference.

UX Australia will host UX Australia 2024 on **August 27-30**. Visit www.uxaustralia.com.au/conferences/ux-australia-2024.

Corinium Global Intelligence will host CDAO Melbourne on **September 2-4**. Visit cdao-mel.coriniumintelligence.com.

CMO Alliance will host the Chief Marketing Officer Summit on **September 4**. Visit events.cmoalliance.com/location/sanfrancisco.

RSS will host its International Conference on **September 2-5**. Visit rss.org.uk/training-events/events/events-2024/rss-2024-international-conference/.

ESOMAR will host ESOMAR Congress on **September 8-11** in **Athens**. Visit community.esomar.org/congress-2024-registration.

Corinium Global Intelligence will host CDAO Brazil on **September 10-11**. Visit cdao-brazil.coriniumintelligence.com.

Corinium Global Intelligence will host CDAO FSI UK on **September 10-11**. Visit cdao-fs-eu.coriniumintelligence.com.

Forrester Research will host Technology & Innovation Summit North America on **September 9-12**. Visit www.forrester.com/event/technology-innovation-north-america/.

Intellus Worldwide will host Intellus Worldwide Fall Institute with Awards on **September 11-13**. Visit www.intellus.org/Events-Webinars.

Insights Association will host the Corporate Researchers Conference on **September 17-19**. Visit www.insightsassociation.org/.

Strategy Institute will host Data Analytics for the Public Sector on **September 18-19**. Visit www.dataanalyticspublicsectorsummit.com.

WBR will host eTail Connect Autumn on **September 24-25** in **London**. Visit etailconnectautumn.wbresearch.com.

Quirk's Media will host Quirk's Virtual – DIY Research on **September 25**. Visit www.quirks.com/events/quirks-virtual-diy-research-2024.

Event details as of May 21, 2024. 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.

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10 minutes with...

Jackie Cooperman
Director, UX Research, Marriott

Jackie Cooperman

"Building trusting relationships gives UX research a seat at the table. The best way I know how to do this is to be transparent."

What led you to a career in UX research?

It feels like the natural progression of my career! I love customer insights and I love technology, so it felt like the right next move. And truthfully, UX designers are an amazing bunch to work with! Their dedication to doing the right thing for users is undoubtedly one of the reasons I've been attracted to this work.

What are the first steps you would recommend for establishing a UX research practice in a company without one?

Provide a basis for why research matters and the value it can bring to a design practice. Design without research is incomplete; researching customers is an essential part of the process. It's imperative to educate partners on the value proposition of a research practice before making an investment in one.

Also, ensure there is an ample appetite for UX-specific research. In some organizations, research may be done by UX designers. Gauge whether there is enough of a need to keep a separate researcher busy as opposed to having the designers do this work themselves.

Establish an intake process – both full support and consultative models. The full model involves the researcher taking on the lion's share of the research, which is ultimately the goal of any UX research team. However, to get the practice started and gain buy-in, I've seen much success in getting the designers involved with a consultative support model to warm them up to the idea of partnering on research. The researcher can view the research plan and give advice on how to best proceed.

Lastly, hire the right people. This feels like a "no kidding," but really, no kidding. Getting the first hire or two is pivotal to the success of the practice. You want people who can technically do the work but also pass the "vibe check." UX research can be highly collaborative, and working well with your stakeholders is just as important as being able to complete tasks. Keep in mind too, you are building a team culture from the ground up!

Do you have any tips for UX researchers looking to build relationships with designers, product managers and more to ensure research findings are effectively communicated across the organization?

I have found getting them involved early and often is the key to success! Yes, the researcher "owns" the research but the results are ultimately used by our stakeholders. Work with them to make sure the research addresses questions that will get them actionable insights.

Building trusting relationships gives UX research a seat at the table. The best way I know how to do this is to be transparent.

Scan to read the full article at www.Quirks.com.