For marketing research and insights professionals

Know more

How curiosity and a broad range

PLUS

Researchers rate their insights departments

The power of a pause during interviewing

How Al is impacting research agencies

ADVERTISING SECTIONS

10 Top In-Home Use **Testing Companies** 10 Top Pharma Research Companies

#facetofacemr Global Field Management Local Recruiting Online Research

Quirk's Marketing Research Review

NOVEMBER/DECEMBER 2024 VOLUME XXXVIII NUMBER 6 WWW.QUIRKS.COM

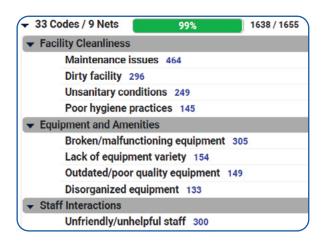
Introducing Theme Extractor 2.0 and Ask Ascribe



Ascribe's Next-Gen Al-Powered Innovations for Open End Analysis

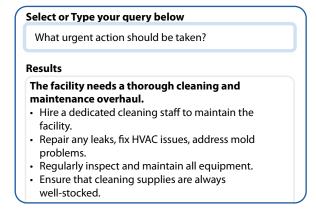
Theme Extractor 2.0 Precision Results. Unparalleled Speed!

Theme Extractor 2.0 automatically analyzes over 95% of open end responses with exceptional accuracy, generating a humanlike codebook with well-structured nets and highly descriptive theme-based codes, virtually eliminating the need for manual intervention.



Ask Ascribe Interview your Data. Just Ask!

Ask Ascribe allows users to ask questions of a dataset and immediately receive relevant answers and a summary report based on the analysis of the data. Whether it's identifying key themes, exploring customer emotions, or determining areas for improvement, Ask Ascribe offers AI-powered insights and reports instantly.









Making Open End Analysis Easier

Ascribe is the #1 global text analysis platform, trusted by market research firms and corporate clients worldwide to make open end analysis easy. Over the past 25 years, Ascribe has analyzed over 6 billion responses through our innovative saas solutions and best-in-class training and support to help you reach your business goals. Scan this QR code to set up a demo.





What if your healthcare moderators had ICU experience?

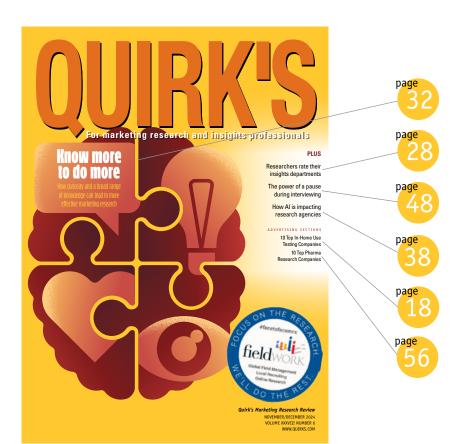
Ours do. Expertise Matters.

Thinkpiece



CONTENTS

Quirk's Marketing Research Review November/December 2024 • Vol. XXXVIII No. 6



ON THE COVER

32 Know more to do more

How curiosity and a broad range of knowledge can lead to more effective marketing research By Terry Grapentine and David Soorholtz

FEATURES

38 Scaling insights

How AI will transform research agencies and their offerings By JD Deitch

42 From recollection to reality

Understanding prescribing trends through chart audits By Lynn Welsh and Tamara Fraley

48 Less is more

How a measured, respectful approach to interviewing yields more insights By Kai K. Fuentes

52 Late life, not less life

Unlocking the potential of older consumers By Bri McIntosh

COLUMNS

8 Trade Talk

The threats and promises of technology By Joseph Rydholm

22 Data Use

How likely are you to recommend this article? By Chris Hauck

26 By the Numbers

Do respondents take us seriously? By Stephen J. Hellebusch

28 Q Report

How valued are internal marketing research departments?

By Marlen Ramirez

DEPARTMENTS

- 4 Click With Quirk's
- 6 In Case You Missed It...
- 10 Innovative Products and Services
- 14 Survey Monitor
- 18 10 Top In-Home Use Testing Companies
- 56 10 Top Pharma Research Companies
- 60 Quirk's Time Capsule
- 61 Calendar of Events
- 62 Index of Advertisers
- 64 Before You Go...

Quirk's Marketing Research Review 4662 Slater Road | Eagan, MN 55122 651-379-6200 | www.quirks.com

Publisher • Steve Quirk steve@quirks.com | x202

Editor • Joseph Rydholm joe@quirks.com | x204

Digital Content Editor • Emily Koenig emilyk@quirks.com | x210

Assistant News and Content Editor ● Marlen Ramirez marlen@quirks.com | x212

Audience Development • Ralene Miller ralene@quirks.com | x201

Magazine Production • Sarah Freske sarah@quirks.com | x216

Directory Sales • Ilana Benusa ilana@quirks.com | x213

V.P. Sales • Evan Tweed evan@quirks.com | x205

Sales • Tammy Slatinsky tammy@quirks.com | x215

European Sales • Stewart Tippler stewart@quirks.com | +44(0)7989-422937

••• moving? make sure
Quirk's comes with you!
Send change of address information to subscribe@quirks.com



Follow us on Instagram at www.instagram.com/quirksmedia.



Follow us on LinkedIn at www.linkedin.com/company/quirk's-marketing-research-review.



Follow us on Facebook at www.facebook.com/QuirksMR/.



An interactive downloadable PDF of this magazine is available at www.quirks.com/magazine-issues.



COLLABORATION KNOWLEDGE SHARING COMMUNITY

Join a new, vibrant community – exclusively for end-client researchers – that brings together the best minds in corporate insights.

Learn more at www.piconline.org.

CLICK WITH QUIRK'S ... online, e-newsletter

and blog highlights



Save the dates for the 2025 Ouirk's Events!

The Quirk's Event will return to Los Angeles on February 26-27, 2025. Come $oldsymbol{1}$ enjoy the sunshine while connecting with industry professionals from all over! Then the Quirk's Events will return to the three flagship locations: Chicago - April 2-3, London - May 7-8 and New York - July 23-24.

There is a lot in store for this year! The Chicago event will be held at a new venue, we're changing up the networking events and much more. You won't want to miss it! Go to TheQuirksEvent.com and register today.

// E-newsworthy

Harnessing AI: Marketing researchers are the new power players in business

How to protect marketing research from fraud in the age of AI

Work and Play: True crime stories and thinking ahead

What do TikTok users want from advertisers?

How to use retail competitor analysis for effective marketing



Scan to access all e-newsletter articles.

Quirk's Blog

Gauging global perceptions of technology and AI-generated content

https://bit.ly/3X25L4z

The researcher's almanac: Understanding brand tracking and key considerations

https://bit.ly/49jd8HD

From media and advertising to co-founding a marketing research

https://bit.ly/3J7JaLr

Research Industry Voices

Seeing through various lenses: The power of diverse perspectives in marketing research

https://bit.ly/4dksZHF

Gen Alpha: How brands should approach advertising to kids and parents

https://bit.ly/3ZBaY4t

How to effectively advertise sustainability

https://bit.ly/4dd3Tu4

Research Careers Blog

Navigating the challenges of reentering the workforce

https://bit.ly/3zyk73c

Six tips to enhance cross-team collaboration

https://bit.ly/3wVRUC2

Building trust: Five tips to build and maintain trust in virtual teams

https://bit.ly/4bG7CQM



Research Methods

RM01 - Practical Marketing Research:

Design, Implement, Deliver
VIRTUAL: \$3,275
Jan 28-31 Apr 29-May 2

RM03 - Designing Effective Questionnaires:

A Step by Step Workshop VIRTUAL: \$3,275 Feb 25-28 May 13-16

Research Applications

RA01 - Applying Research & Insights:

Customer, Brand, Product VIRTUAL: \$2,880 Feb 11-13

RA03 - Market Segmentation:

Designing, Implementing, Activating VIRTUAL: \$3,275 May 6-9

RA04 - Fundamentals of Pricing Research:

Strategies & Analytical Techniques VIRTUAL: \$2,880 June 11-12

New! RA20 - Beyond Today's Insights:

New!

New!

Machine Learning, Text Analytics, and Generative Al

VIRTUAL: \$295 Feb 19 May 14

RA21 - Navigating Today's Online Sample Sources

VIRTUAL: \$295 Mar 5 June 17

RA22 - Shopper Science Toolkit: Best Practices to

Understand Changing Shopper Behavior

VIRTUAL: \$295 Date TBD

Communication

C01 - Writing & Presenting Marketing Research Reports:

Insights, Storytelling, Data Visualization

VIRTUAL: \$3,275 Mar 18-21

Qualitative

Q01 - Moderator Training: Focus Groups & IDIs

Q02 - Specialized Moderator Skills for Qualitative

VIRTUAL: \$3,390 Mar 11-14

Research Applications

Q04 - Building Better Facilitation Skills:

Activation, Innovation, Co-creation
IN-PERSON (Cincinnati): \$2,925
May 20-21

Visit BurkeInstitute.com to learn more about:

Certificate Programs

Company Customized Seminars

(virtual & in-person)

Early Bird Savings

Pass Programs

(with 3 and 12-month option)

© 2024 Burke, Incorporated. All rights reserve

••• entrepreneurship research

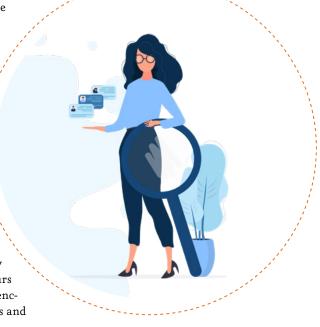
Female mentors and female mentees are a winning business combination

A study from the University of Notre Dame, Texas A&M, University of Chicago and London School of Economics recommends a simple adjustment to training systems to give women in business a better shot at success: pair female mentors with female entrepreneurs.

The Marketing Science article, "Breaking the glass ceiling: Empowering female entrepreneurs through female mentors," reports on findings from a field experiment conducted in Kampala, Uganda,

with 930 entrepreneurs, 40 percent of whom were

The entrepreneurs were randomly matched with a female mentor, a male mentor or no mentor. Recruited by the organization Grow Movement and based all over the world, the mentors worked for several months remotely with the entrepreneurs through videoconferencing, phone calls, texts and shared documents.



A follow-up study two years later showed that businesswomen in emerging markets benefitted significantly more from having a female as opposed to a male mentor. Why? The female mentors proved to be more positive and social in their interactions with the female entrepreneurs – suggesting they were more engaged. The women paired with female mentors learned to build better customer relationships, such as by reaching out post-purchase to ask about their customers' experience and what could be improved.

Sales and profits of female entrepreneurs guided by female mentors increased by, on average, 32 percent and 31 percent compared with the control group, whereas female entrepreneurs who were mentored by men did not significantly improve their sales and profits.

••• shopper insights For self-checkout, change 'have to' to 'get to'

One way to win over customers who are skeptical about self-checkout lanes may be to add a sense of agency to the process, according to studies conducted by researchers from Drexel University.

As reported in a Journal of Business Research article, "Feeling rewarded and entitled to be served: Understanding the influence of self- versus regular checkout on customer loyalty," researchers from Drexel's LeBow College of Business looked at how self-checkout systems in grocery stores influence customer loyalty compared to regular checkout systems.

Noting that loyalty can be somewhat eroded among self-checkout users, the authors found that encouraging study participants to associate the extra effort involved in self-checkout with a feeling of achievement can mitigate the damage to feelings of loyalty.

Granted, it would take a deft touch to spin something that for many consumers is just another example of corporate cost-cutting (more self-checkouts = lower labor outlays) as a time-saving bit of empowerment, but using signage to emphasize the proactive, easy-in/easy-out aspects could pay off, especially as other forms of frictionless or contactless checkout like scan-andgo and smart carts become more widely used.

"We found that when customers were encouraged to think of the extra effort involved in self-checkout as a rewarding experience, their perceived loyalty to the store was similar to those of regular checkout shoppers," says coauthor Yanliu Huang.









Companies hire me to find out what their customers REALLY think about their brands. And the best way to do that is to talk to them directly, in-person, face-to-face. There's no better way to connect with a customer, experience empathy, make them feel comfortable, and encourage them to share their thoughts.

Bruce Peoples, Consumer Insights Consultant at Peoples Marketing Insights

As global travel continues to increase, we're excited to welcome our clients in-person both near and far. It's been exciting to dig back in the toolbox and pull out some of the more robust methodology options that involved a more personal, face-to-face experience. Our clients are loving not only the rich insight gains but also the unique experience of visiting participants in their city and immersing themselves in their culture.

Abby Goodell, President of Fieldwork Network International

SĀGO



There's a richness of interaction and that transmission of feeling, of communication, that comes with the sync of not only words but body language. And simply put, the humanity of being with others. The acoustics are not quite the same when a song is compressed into digital bits of data, and human interaction is no different. Some of the richness of that interaction and some of the opportunity for empathy is simply lost along the way.

Cory Lebson, Principal at Lebsontech

It is estimated that over 70% of communication happens below the neck. Product features like touch, weight, and contrast are simply not conveyed correctly in digital environments.

Jamin Brazil, Happy Market Research Podcast Host

#facetofacemrx

In-person research always has and always will play an important role for market researchers. In-person research is important for behavioral research whether testing reactions to life-sized stimuli, conducting eye-tracking, observational research or ethnography. Many game changing insights for companies would not have happened without in-person research. We behave differently in-person versus online and while each tool plays a different role in the market researchers toolkit, in-person is irreplaceable for certain research initiatives. With in-person research you can observe behavioral nuances, understand cultural influences and capture the impromptu moments when true inspiration and insight can happen. We've all been there when the biggest insight comes when the moderator leaves the room and the respondents talk on their own! Here's to a return to in-person research, enhanced collaboration, stronger emotional connections and measuring behavior.

Anne Stephenson, Partner at Explorer Research



QUIRK'S



Herron Associates, Inc. Opinion and Marketing Research



O FUEL





Connecting. Educating. Advancing.



The threats and promises of technology

Keeping pace with the changes wrought by technology used to be viewed as a means of getting ahead in your career. These days, thanks to AI, it's almost a matter of survival. While some job impacts are already being felt, others may be decades down the road. What should you do in the meantime? Two recent books offer helpful insights and advice on harnessing technology to your benefit.

AI, of course, is the main source of stress for a lot of workers these days, and not just those in so-called knowledge industries like marketing research. With his book "Welcome to AI" (Harvard Business Press), David L. Shrier, a technology expert and professor at Imperial College Business School, delivers an accessible, big-picture overview of the current AI landscape. It's subtitled "a human guide to artificial intelligence" but I would change "human" to "worker's," as much of the book centers around how AI is impacting jobs and careers and how it is likely to do so in the future.

An early chapter on related concepts – generative AI; supervised vs. unsupervised learning; expert systems – concisely lays out some of the main ideas associated with AI, giving the reader an easy-to-digest sense of how we got where we are before the book pivots to its employment-focused assessments of AI

It's early days, so some of his musings are just that – well-informed guesses on how things might go or which types of careers might be most or least impacted by AI. Naturally, his

view is that jobs that involve direct human contact (he cites mainly health care-related positions) won't be easily replaced by AI, nor will those who install or maintain energy systems or whose work requires or benefits from a high degree of emotional intelligence.

The upshot for marketing researchers? In Shrier's view, no one will emerge unscathed. Many of an insight worker's core duties – such as finding and making sense of all forms of data and information – are ripe for automation but I kept coming back to his points about emotional intelligence and human contact, two factors that researchers are well-versed in, as potential buffers capable of staving off obliteration by AI.

Based on its title, you might think the next book, "The Consumer Insights Revolution" (ReThink Press), goes heavy on the AI but aside from some expected mentions of it, authors Steve Phillips, Ryan Barry, Stephan Gans and Kate Schardt have kept their content mercifully light on AI.

Instead, their focus is on PepsiCo's journey to organize (or "digitalize," as the authors refer to it) the company's vast troves of research data and findings with help from Zappi's technology. (Phillips is CEO and co-founder of Zappi and Barry is the firm's president. Gans is PepsiCo's SVP, chief consumer insights officer and Schardt is PepsiCo's VP, global insights capabilities and partnerships.)

At the outset it feels like it could be a potential commercial in book form where the PepsiCo authors wax poetic



Joe Rydholm can be reached at joe@quirks.com

about Zappi and though there is certainly a positive tone throughout, the grounding of the majority of the book in the experiences of PepsiCo researchers (and those of other Zappi clients) overcomes any fears of self-promotion and instead ends up giving readers an enlightening peek into the insights function of one of the world's best-known brands.

And while of course the Zappi authors would no doubt prefer that you use their platform, there is enough information here (a good half of the book) on why and how an internal research department can and should assemble and integrate its various information sources to make it worth reading. I found the section of anecdotes from Gans and Schardt about introducing the platform to sometimesskeptical internal audiences particularly interesting. And, as a team, the four authors make a convincing case for the value of marketing research and for the ability of researchers to use technology to assemble and disseminate the strategic insights that truly make a difference to their organizations.

Every child should have equal opportunity and access to a quality education.

During the 2024 Backpack Challenge, the MR industry logged 138,243 minutes reading and donated \$15,000 to promote children's literacy. In partnership with the Kids In Need Foundation, the Marketing Research Education Foundation (MREF) will help to send 600 backpacks full of essential school supplies to under-resourced kids.



A SPECIAL THANK YOU TO OUR BACKPACK CHALLENGE SPONSORS:

PATRON OF PAGES (100 backpacks)





STORYTELLER (40 backpacks)









BOOKWORM (20 backpacks)











INNOVATIVE PRODUCTS & SERVICES



Methodologies, techniques and technologies are rapidly changing in the marketing research and insights industry. New products and services are being made and improved at an extremely fast pace. How can you keep up with what's new? Quirk's has you covered. Whether you're looking for new software, services or technologies, these companies offer the newest tools and innovations to help your research stay up to speed!

Protobrand's brand trackers: Powered by AI + behavioral science

Conventional trackers provide insights about the "what," but not the "so what." With poor ROI, their standardized brand attributes are not responsive to emergent and shifting perceptions. These KPIs do not reflect what consumers think about your brand or how it makes them feel, making their insights less actionable.

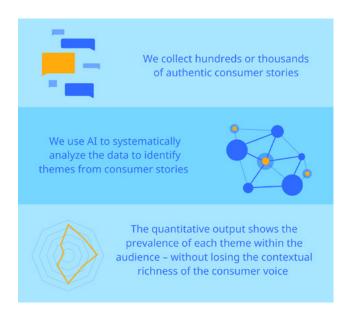
Protobrand is a full-service market research consultancy that blends AI and behavioral science to develop insights that transform businesses. Protobrand's brand trackers help explain the "why" or "so what" behind your KPIs with a constant rate of learning that includes the subconscious meaning consumers associate with the brand, symbolic identity goals (that drive relatability and connection) and help track these emergent salient themes as leading indicators. This results in higher ROI than conventional trackers.

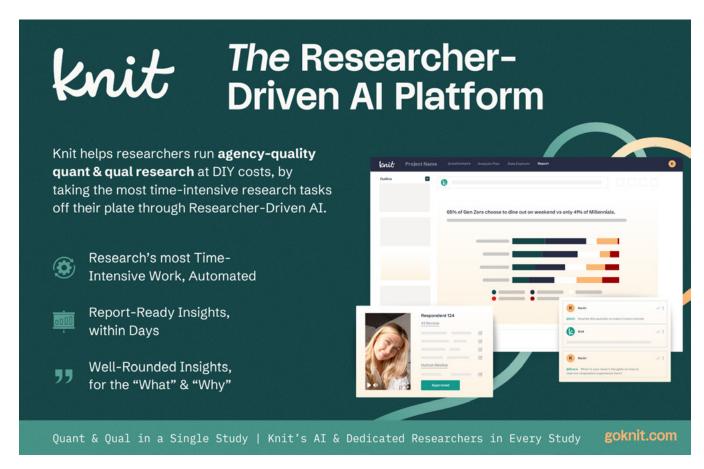
Leveraging cutting-edge technology including Respond by Voice + AI Probing, respondents can now organically articulate experiences without the hassle of typing. AI probing helps encourage deeper reflection, leading to more actionable insights for strategic brand management.



A well-designed brand tracking program provides insights about brand meaning and makes it possible to manage the brand strategically. Interested to learn more? Book a demo today.

protobrand.com/book-a-demo





Knit: Introducing "Researcher-Driven AI" to the insights world

Helping researchers run agency-quality quant and qual research at DIY costs

Too often, market research means compromising. Insights professionals are forced to choose. Speed or quality? Time savings or cost savings? Quantitative capabilities or qualitative capabilities? And too often, the solutions you're most familiar with don't have the answers.

The agencies you've partnered with are likely expensive and frequently take a bit too long to wrap your project. And while DIY tools might be quick, you're probably still racking up hours of your own time to drive meaningful insights.

Meanwhile, almost every solution tries to tack on AI functionality to keep pace but the trade-offs keep coming. The AI is "out-of-the-box": The outputs rarely feel useful or custom to your needs. The user experience isn't intuitive: You have to learn new workflows and navigate a subpar experience. The technology isn't intelligent: You still

have to dig for insights. The efficiency isn't there: You're spending too much time editing deliverables. When solutions complicate your work, they're not solutions at all.

At Knit, we're traveling a different path – one that begins with you. Meet Researcher-Driven AI. Instead of changing the way you work, Knit is a platform you control and customize. Your expertise is the engine and Knit optimizes your research process so it's faster, more formidable and more focused on what matters most.

Here's our promise: We'll make sure you're able to do the things you do best and that are most meaningful to you. That means running more research and illuminating the kind of well-rounded findings that move your organization forward. That means freedom from time-intensive tasks, like building and formatting reports. Through quantitative, qualitative and video insights, we

want you to paint the big picture and tell the full story – not get bogged down in the day-to-day.

So, use Knit to amplify your institutional knowledge and the unique value you bring to your company. Use it to author questionnaires, tackle analysis and draft presentations that are more powerful and compelling. And use it to sharpen every step of each study, boosting speed and accuracy from end-to-end.

With Knit, researchers arrive at actionable answers faster, the first time, every time. No compromises. No trade-offs.

goknit.com



Qualitative insights at scale

With important decisions being made faster and faster, it's crucial that the voice of consumers is heard quickly and clearly by decision makers

Daisy is an AI-enabled moderator embedded in surveys, unveiling rich layers of insights at speed. Daisy combines the speed of an online survey with the in-depth perspective of qualitative research to provide a more granular level of consumer insight.

Daisy starts with a typical openended question, with the respondent's first answer piped through a closed API to an AI model, which generates a relevant and specific follow-up probe in real time. Using multiple follow-ups, the result is a respondent experience



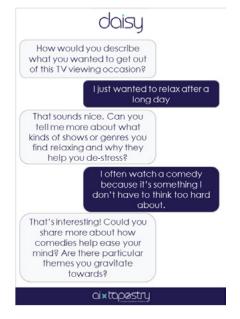
akin to a moderated interview and a depth of insight not previously found in a survey.

Daisy delivers more for respondents and for you

When compared to a standard openended question, Daisy results in:

- · An average response 5x longer.
- · More thoughtful responses.
- A greater number of themes unearthed (both rational and emotive).
- Greater engagement with eight in 10 enjoying the survey experience.

There are endless possibilities with Daisy, for example, you can gain deeper insight into the emotional connection users have with brands, dive deeper into concept testing and it can be a cost- and time-effective alternative to early-stage exploratory qual.



https://tapestryresearch.com/2024/06/06/ tapestry-research-launch-daisy-a-new-aiinfused-tool/

Every (insights) hero needs a sidekick: Meet Asa from Canvs AI

As the insights superhero in your business, there's one villain you're constantly up against: time. No matter how skilled or experienced you are, or the size of your insights team, the pressure to analyze data, uncover themes and deliver compelling insights quickly is a constant challenge. Meet Asa (short for AI Story Assist), the revolutionary research sidekick from Canvs AI designed to help boost productivity and elevate your insights.

As a is the next-generation of AI-powered research assistants, designed to give you superhuman speed and efficiency in your insights work.



With Asa, you can:

Investigate: As a can quickly create summaries, find answers and draft explanations to help you explore your data.

Compare: As a can use your quantitative along with qualitative data to make comparisons and outline the key differences in data.

Visualize: As a can suggest, create and tailor data visualizations to help you tell the story with style and evidence.

Consult: As a can create reports, generate ideas based on feedback and identify relevant examples in your data.

Discover how Asa can transform your insights process, boost your efficiency and elevate your strategic impact – leaving you free to focus on what truly matters: Evidence-based insights that drive your business forward. Visit canvs.ai/asa to meet Asa for yourself.

canvs.ai/asa







TheQuirksEvent.com









CHOOSE THE DATE AND LOCATION THAT WORKS FOR YOU

QUIRK'S IN FOCUS

A digest of survey findings and new insights for researchers

••• shopper insights

Get the gifting done fast

Holiday shoppers aim shop early, efficiently

Fifty-four percent of holiday shoppers don't view Black Friday and Cyber Monday as essential for their holiday shopping needs but 52% still plan to shop on those days, found Basis Technologies. Among this audience, 65% say they will shop early to avoid shipping delays and 62% want to get their shopping done as fast as possible.

TV ads (traditional and CTV) influence Millennials or Gen X holiday gift buying only 10% to 12% more than the average U.S. consumer. Baby Boomers are much less influenced by ads in any channel than the average consumer. For gift buying, Millennials and Gen Z tend to be more influenced by social media or general online media ads (ranges from 36% to 68% more) than the average consumer.

When considering their top personal influences, the main choices for holiday gift shoppers are the gift recipient (52%), recommendations from friends/family (47%) and customer reviews (35%) and only 28% of recipients say that brand familiarity influences them. Fifty-three percent will shop where there is free shipping, 51% are heavily influenced by sales and promotions and 53% of holiday gift

shoppers prefer retailers that help them find unique gifts.

Fifty-seven percent of holiday shoppers plan to set a budget and stick to it. Fifty-six percent of respondents anticipate spending the same amount as last year with 29% expecting to spend a bit more. Seven percent aim to spend a bit less and only 1% say they will spend a lot less. Among respondents that say they will increase holiday shopping spend, inflation driving up gift prices was the choice cited most often (64%), followed by having more people to shop for this year (23%) and having more expensive items to gift (21%). Fourteen percent say they got a raise or new job that allows them to spend more on gifts this year.

The top reasons for those planning to decrease holiday shopping spend are economic worries (44%), uncertainty about the future (42%), having expenses that are prioritized over gifts (40%) and 20% say they have less people to shop for this year. Among respondents, 57% say holidays are an important part of their identity and 51% believe their holiday traditions connect them to their cultural background.

Sixty-one percent prefer to shop local or at small businesses, 56% are more likely to buy from retailers or brands that show they care for employees and 37% like to buy from minority/women owned stores and brands. Only 18% of holiday shoppers say they will shop "mostly" or "entirely" in person, 43% say they will do it "mostly" or "entirely" online and 39% say they will do it equally in person and online.

Seventy-two percent of respondents will buy gifts on a laptop or computer, 40% will make purchases through apps and 20% through social media. Forty-two percent of the Gen Z audience said they are likely to purchase holiday gifts through social media. Respondents that say they would buy gifts on social media cite Instagram (57%), Facebook (56%) and TikTok (43%) as their channel of choice

Basis Technologies' biannual holiday shopping study was conducted with audience research firm GWI and completed in May using responses from more than 2,000 U.S. consumers ages 16+.

travel researchMore freedomto go

Young travelers want different airline program perks

Travelers are eager to fly and plan trips but they remain cost-conscious and, depending on the generation, less swayed by traditional airline loyalty programs, according to OAG's latest survey. While loyalty and frequent flyer programs remain popular among all travelers, airlines need to reinvent their approach with younger travelers who are less likely to be enrolled than their older peers.

Only 65% of Gen Z and 70% of Millennials report being enrolled in airline frequent flyer programs, compared to 89% of Baby Boomers and 80% of Gen X. The No. 1 barrier to joining loyalty and frequent flyer programs is lack of consistent travel with a single carrier or brand (61%), followed by the amount of time it takes to redeem awards (14%) and a fear of airlines gaining access to data (8%). Respondents' top incentives to sign up for an airline credit card are the option for free checked baggage (63%), the sign-up bonus (56%) and access to airport lounges (43%).

The survey suggests that the best way for airlines to improve loyalty program adoption and engagement is to allow customers to use earned points elsewhere in their travels. This speaks to younger generations' desire to have rewards that are specific to their travel preferences and booking patterns. Fifty percent of Gen Z and 49% of Millennials want to use points with vacation rental providers. Seventy-three percent of all travelers desire to put their airline rewards program points towards hotel accommodations, followed by car rental services (53%).

Younger travelers prioritize experiential factors over cost, with Gen Z and Millennials being 27% more likely to pay up to \$100 more for a ticket to fly with a legacy carrier as opposed to a low or ultra-low-cost carrier.

Most travelers purchase add-on services through an airline's website (48%) or mobile app (37%), with only 10% opting for gate and 5% for in-flight purchases. Gen Z is the most likely to purchase add-ons on the plane (12%). Half of all travelers prefer to purchase add-ons at the time of booking, with 26% purchasing addons in between booking and check-in. Another 12% are likely to purchase add-ons at the time of check-in, 6% at the airport and 6% doing so in-flight. Although 67% of all travelers are willing to pay up to \$20 to take more than one extra carry-on item into the cabin, 50% think too much luggage is being taken into the cabin and agree with airline policies getting stricter about carry-on baggage.

OAG surveyed 2,000 North American travelers in April 2024.

••• health care research Skeptical of AI in health care

Clinicians don't trust hospital leadership or the technology

Despite broad optimism about the benefits of generative AI in health care, those on the front lines of delivery have concerns about its implementation. Health care insight consultancy Day One Strategy revealed that nearly three in four clinicians have experience using large language model (LLM) generative AI programs, with ChatGPT being the most used by far (72%). Google LLMs, such as Bard, recently rebranded to Gemini (38%) and Med-PaLM (24%)

and Meta's Llama (19%) are the next-most popular.

More than half believe AI can save time (57%) and that it will transform health care delivery (56%) while exactly half believe AI use can help them deliver better patient care. Despite high levels of personal use and optimism for its future impact in health care, clinicians remain wary of using AI for health care in the near term with 31% being somewhat aware of AI developments and 11% remaining unaware of them.

Only 20% percent of respondents say their practice or clinic uses wearable devices, processing data from wearable devices to monitor patients' vital signs. Twenty percent say their practice/clinic has used generative AI for clinical documentation to analyze information from unstructured clinical notes and 19% have used chatbots and virtual assistants to help with patient communication, appointment scheduling and to answer common health care questions. Most respondents say their practice/clinic does not use predictive analytics (60%) or diagnostic imaging (56%).

There is a higher level of mistrust (27%) than trust (22%) in the current AI algorithms. Two-thirds don't trust their hospital/clinic leaders and don't trust that AI will reduce liability with four in 10 believing that AI use will put them at greater risk of liability. Nearly half (42%) of clinicians are unprepared for the implementation of gen AI into their practice but 50% agree that implementation will require new training. Thirty-two percent, however, trust in their hospital/clinic leadership with the implementation of AI.

Less than one in five clinics are prioritizing gen AI in 2024 strategic objectives and only a tenth have seen a policy on the use of gen AI in their clinic/hospital. Meanwhile, six in 10 clinicians agree that AI in health care needs government regulation.

This online survey was conducted by QuestionPro on February 19, 2024 with a total of 501 adult respondents.

••• consumer research Influenced by the influencer

Content from online creators drives Gen Z purchases

Nearly half of Americans (48%) have purchased a product they saw featured in creator-generated content, sometimes also called influencer content, on an entertainment app or social media platform, according to a consumer sentiment survey commissioned by CPG advertising effectiveness company NCSolutions.

Sixty-six percent of Gen Z have purchased a product that appeared in creator-generated content. Over half (55%) of Millennials, 41% of Gen X and 24% of Baby Boomers have also purchased a product they saw from influencer content on a social media platform or entertainment app.

When Americans see influencer-generated advertising, they feel entertained (47%) and ready to research the product (43%). Twenty-four percent are likely to share the endorsed product with friends and family and 23% feel inspired. Fifty-two percent of consumers earning \$100,000 annually made a purchase on an entertainment app or social media platform based on a post, reel or video from a creator or influencer. Forty-six percent of those earning \$50,000-\$99,000 and 41% of those with incomes less than \$50,000 made a

How Americans feel when seeing creator-generated content



purchase after viewing an endorsement in creator-generated content.

Gen Z has more favorable attitudes towards this content compared to other generations. After viewing creatorgenerated content for a product, 37% of Gen Z, compared to 23% of all other generations, expressed appreciation for creators sharing personal aspects of their lives. Additionally, 27% of Gen Z, compared to 12% of all other generations, feel strongly connected to influencers, like they are friends.

Twenty-seven percent of Gen Z, compared to 15% of all other generations, feel influencers are looking out for their viewers' best interests by endorsing only top-quality products. Twenty-two percent of Gen Z versus 14% of all other generations feel their needs were understood by influencers. Twenty-one

percent trust influencers and their recommendations, compared to 13% of all other generations, and 16% of Gen Z feels represented by creators, compared to 9% of all other generations.

Consumers identified the elements of creator-generated advertisements that strike a chord with them. Things that make viewers laugh win the day, with 50% of Americans choosing humor as the No. 1 attribute. How-to videos were cited by 40%, followed by music (37%), authenticity (34%), storytelling (33%), product suggestions (27%) and the connection with the influencer (12%). Additionally, 9% of consumers enjoy filters as a part of their advertising experience.

NCSolutions commissioned the consumer sentiment survey of 1,124 Americans in May 2024.

Advertising attributes consumers like most



• • • sports research

More eyes, more cheers

Women's sports gain momentum

round the world, fans of women's Asports are watching more this year compared to last year. In the U.K. (36%), Australia (34%) and Spain (32%), one in three women's sports fans are watching more this year, higher than in the U.S. (27%), Canada (29%), Germany (23%) and France (24%). According to a survey by SurveyMonkey and sports marketing and sponsorship platform Parity, 23% of men watch women's sports daily or weekly, compared to 15% of women, refuting assumptions that women's sports fans are primarily women. Additionally, 30% of men around the world are watching more women's sports in 2024 compared to

Most respondents (88%) agree that professional women athletes are "somewhat" or "highly" impactful role models for young women. Respondents who watch women's sports daily or weekly are 3.5x more likely to buy a product promoted by a woman athlete than another type of influencer. Respondents overall are more than twice as likely to buy a product promoted by a woman athlete over another influencer. Instagram is the top platform for following individual women athletes across all countries, followed by Facebook and YouTube. Australians (42%) are the most likely to follow women's sports accounts on social media, followed by the U.S. (38%), U.K. (36%), Canada (39%), Germany (30%), Spain (34%) and France (26%).

Soccer and tennis are the mostwatched women's sports internationally in all countries surveyed. The U.S. (56%) is the exception, where basketball is by far the most-watched sporting event, compared to 25% or less viewership in all other countries.

The global majority agree that women athletes are being shortchanged

www.quirks.com

and want more brand investment in them. Equity in women's sports still has a long way to go. Half or more in each country believe that brands are not investing enough in women's sports compared to men's sports with 50% in the U.S., 50% in the U.K., 51% in Australia, 56% in Canada, 53% in Germany, 59% in Spain and 66% in France.

Despite a growing interest in women's sports, a lack of time to watch remains a barrier, especially for women. It's the main barrier for 43% of Germans and many in the U.K. (41%), Spain (40%), the U.S. (40%), Australia (39%), Canada (39%) and France (35%). Globally, women are overall more likely than men to report lacking sufficient time to watch women's sports (42% vs. 39%). More than double 18-34-year-olds (7%) compared to 65+ (3%) cite cost as a barrier to viewing. This shows an increase in interest among generations but a lack of accessibility. Women and gender non-conforming respondents are also slightly more likely than men to say the cost of watching women's sports is a barrier.

This SurveyMonkey poll was conducted March 28-April 10, 2024, among a national sample of 5,408 U.S., 1,972 U.K., 1,251 Australian, 1,743 Canadian, 1,290 German, 1,193 Spanish and 1,517 French adults 18+.

••• lifestyle research The joy of cooking

Gen Z, Millennials see healthy eating as an affordable pleasure

🗖 en Z and Millennials are leading a movement towards healthy eating amid the current cost-of-living crisis by scaling back on non-essentials, including streaming services, according to a survey by healthy eating platform Lifesum. To prioritize spending on healthier foods, Gen Z and Millennials would cut back on fashion (62%), tech and gadgets (55%), online courses (37%), streaming services (36%), travel (34%) and skincare and beauty (30%). Only

10% of respondents indicated that it is not a priority for them.

For Gen Z and Millennials, healthy eating has emerged as an affordable and accessible source of pleasure, particularly at a time when indulging in major experiences like travel may seem unattainable. Millennials and Gen Z are leading the shift towards healthier eating habits as they juggle increasingly hectic lifestyles and seek novel experiences through food. Sixty-three percent of respondents say they are omnivores, 14% consider themselves flexitarians, 8% are vegetarians, 7% are pescatarians and 4% follow vegan diets. When it comes to sustainable eating practices, 44% say they practice seasonal eating, others locally source items (40%) and others make sustainable seafood choices (20%). Some respondents follow a plantbased diet (28%), prioritize zero-waste cooking (25%), have their own home gardens (24%) and compost (22%) to make a difference.

Healthy eating has become the dominant force in the food industry and the desire for well-being and nutritious food options are influencing other areas of people's lives, including work. Sixty-nine percent say they would be more productive at work if their employer helped improve their health and well-being and a staggering 71% are prepared to quit their job tomorrow for one that better supports their well-

Gen Z and Millennials are embracing functional foods that provide additional health benefits, such as improving digestion, boosting immunity or enhancing cognitive function. Seventy-three percent are consuming these foods to boost energy levels, 61% to enhance mental well-being and 40% to promote better sleep. Others are most intrigued by the ability to improve gut health (65%), skincare (26%) and hormones (40%).

Lifesum's 2024 State of Healthy Eating and Wellbeing Report is based on a survey of 10,000 Gen Z and Millennial app users. The data was manually obtained from Lifesum's internal database and surveys from December 2023.

••• special advertising section

10 TOP IN-HOME USE TESTING COMPANIES

While product development and testing may sound like straightforward steps, to ensure the creation of a high-quality product, companies must consider a range of factors. In-home use tests (IHUTs) offer researchers authentic insights into how individuals use products from the comfort of their own home.

These companies offer the resources needed to properly conduct IHUTs including targeted participant recruitment, assistance in the labeling, packaging and shipping of products, consultative services and more.



C&C Market Research

Founded 1993 | 300 employees Thomas Morrison, Senior Project Director

As Malcolm Forbes wisely stated, "The best vision is insight." IHUTs, or in-home use tests, provide a unique opportunity to gain invaluable insights directly from con-



sumers about various products. C&C excels in recruiting these consumers and managing the entire fieldwork process, whether it be online, in person or a combination of both. Our extensive network of 32 C&C offices strategically located across the United States allows us to tap into localized databases, ensuring we can find the ideal consumers who align perfectly with your specific project requirements. By leveraging our deep understanding of local markets and consumer demographics, we deliver targeted recruiting solutions that drive successful IHUTs.

Phone 1-479-785-5637 www.ccmarketresearch.com



Decision Analyst

Founded 1978 | 120 employees Jerry W. Thomas, CEO Bonnie Janzen, President Felicia Rogers, Corporate Executive Vice President





Decision Analyst is a recognized leader in in-home usage testing (IHUTs) and product optimization. Our experts have evaluated more than 2,000 consumer packaged goods and durable goods during the past four decades. We offer customized research and analytical services to help our clients improve existing products and create new products. Our product testing services include IHUTs, central-location taste tests, product clinics and product optimization techniques using choice modeling. We favor monadic testing of products but also design and execute paired-comparison, sequential-monadic and protomonadic tests. Optima®, our IHUT product testing system, predicts consumer acceptance, determines the optimal set of ingredients or features and optimizes pricing. Our team members have extensive experience in conducting and analyzing IHUTs and optimization studies. We own and operate consumer panels for IHUTs and have our own facilities for on-site labeling, packaging and shipping of test products.

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

.....



Esearch

Founded 1995 | 10 employees Michael Holmes, CEO Amy Carley, Executive Vice President



Esearch has provided online market research since 1995. Esearch had a vision where market research data could be collected in hours, not days. A vision where respondents entered their answers on an electronic web form, where once the research was designed, it could be implemented immediately with results available while the topic was hot and while the questions were fresh. This vision led us at Esearch to develop one of the first online research panels. Esearch has grown up with the internet and has learned how to operate in this evolving environment with a focus on respect for panel members and quality, reliable data. Esearch respondents enjoy the opportunity to participate in a meaningful way. We recruit participants to test products in their everyday environments, providing authentic feedback that helps you understand how your products perform where it matters most.

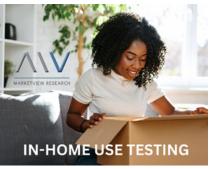
E-mail Esearch@esearch.com www.esearch.com



MARKETVIEW RESEARCH

MarketView Research

Founded 1999 | 25+ employees Jessica Cardella, Senior Vice President



MarketView Research's award-winning in-home use testing expertise has fueled the growth of numerous top brands in the market today. Every day, our clients rely on our IHUT expertise to determine what product features appeal most to consumers - helping them navigate where to invest time, money and resources. From planning and survey development to fieldwork and analysis, our insights give you the leverage to accelerate innovation and create customer-centric products that stand out in the marketplace. And how do we do it? Simply deliver your product to our in-house facility and we'll handle the rest. For over 25 years, our rigorous, quality-centric process has ensured that every detail of your test is handled with the utmost care. Our team provides support from start to finish - ensuring that the highest quality standards are met for every test, every time.

Phone 1-201-840-5286 www.mvrg.com



Mindfield – Tech Integration and Audience Solutions

Founded in 1980 as McMillion Research LLC Jay Mace, Senior Vice President

Mindfield, your premier partner for customized research solutions in IHUT studies. As the first platform of its kind, we tailor our offerings



to meet your unique needs across all verticals and study types, ensuring optimal follow-up return rates. Our rigorous participant validation process guarantees that every respondent meets our high IQD quality standards. With Mindfield, you're not just choosing a research solution, you're investing in quality and precision. Our cutting-edge technology and diverse audience solutions empower you to make informed decisions with confidence. Elevate your research experience and achieve exceptional results with Mindfield today!

E-mail jmace@mindfieldtech.com Phone 1-304-343-4241 mindfieldtech.com

...........



Founded 1999 | 38 employees John Rindone, Chief Operating Officer

For 25 years, MMR Research Associates has delivered crucial insights through diverse methodologies, including in-home use product testing, central location



testing and customer intercepts at the point-of-purchase, often using geo-fencing technology. This expertise spans domestic and international markets, employing complex placement protocols and diverse recruitment methods to ensure reliable sampling, even with hard-to-reach targets. Our methodagnostic approach prioritizes business context before applying appropriate techniques. Advanced product attribute analysis, including Kano analysis, rewards and penalties techniques and key driver identification, provides crucial insights into user satisfaction and repeat purchase behavior. These methodologies uncover attributes that drive performance, limit success or have minimal impact. Since becoming employee-owned in 2019, MMR has deepened its commitment to providing actionable direction. Our focus remains on delivering full-service, agile marketing research solutions that yield crucial insights and drive growth and innovation for clients' businesses.

Phone 1-770-650-5005 x160 www.mmrresearch.com



Murray Hill National

Founded 2013 | 35 employees Susan Owens, COO

Murray Hill
National has
dedicated space
for shipping and
receiving IHUT
test products
and the ability to place your
products across



the United States face to face with your test participants. Clients trust Murray Hill National with thousands of studies per year as their research partner. In return, we deliver valuable solutions and high-quality recruitment for their consumer, health care, business-tobusiness and technology projects. For the last seven years Murray Hill National LLP, rebranded under new ownership, has advanced to one of the leading data collection and recruitment companies in the U.S. Our teams are committed to meeting your research needs. We provide high-quality health care recruitment with access to 465,000 physicians, nurses and more, and we organize 100+ patient panels. Our qualitative services extend far beyond the traditional focus group. Our call center has 45 CATI stations where we conduct all our telephone interviewing including qualitative, quantitative, phone-to-web or old-fashioned CATI. Call us today for your next project, your "national" recruiting experts - we find respondents!

E-mail susan@murrayhillnational.com Phone 1-972-707-7645 www.murrayhillnational.com



Precision Research Inc.

Founded 1959 | 25-49 employees Scott Adleman, President



At Precision Research, we specialize in marketing research focused on recruiting, placement and data collection for home-use product studies. Our mission is to deliver high-quality insights by partnering with brands to gather authentic feedback directly from their target audience. We excel in identifying and recruiting participants that fit specific demographic and consumer profiles, ensuring that the right products reach the right users. By conducting real-world home-use studies, we collect genuine consumer insights, helping brands refine their products based on actual user experiences. Our team is skilled in designing surveys and gathering data to create actionable reports, enabling businesses to make informed decisions that drive product development, innovation and marketing strategies. At Precision Research, we're dedicated to providing the reliable consumer feedback brands need to succeed in today's competitive market.

Phone 1-847-257-0827 www.preres.com



Symmetric, A Decision Analyst Company

Founded 2016 | 120 employees Jason Thomas, CEO of Symmetric

Symmetric operates American Consumer Opinion® (a worldwide panel of millions of consumers, established in 1995) and five B2B worldwide online panels: Physicians



Advisory Council®, Medical Advisory Board®, Executive Advisory Board®, Contractor Advisory Board® and Technology Advisory Board®. We have over 40 years of experience conducting in-home usage tests. Our professional team includes meticulous and dedicated industry experts. Our product processing and shipping facilities encompass 1,500 square feet with ample space for product storage. Facilities are temperature-controlled and cleaned daily. Employees who handle test products or work in the product-storage room are required to wear surgical gloves. At Symmetric, we place a high value on representative samples, scientific sampling methods and advanced fraud-detection systems. Our online panels are carefully balanced, continually refreshed and systematically cleaned. In addition to IHUT mailing, our services include programming, hosting, online communities, tabulation and coding.

Phone 1-817-649-5243 www.symmetricsampling.com/services/ mailing

.....



Various Views Research

Founded 2007 | 54 employees Sharon Lally, CEO

With over 30 years of industry leadership, VVR proudly stands as the preeminent female-owned market research and consumer insights firm located in Cincinnati. Our



enduring commitment to quality, value and meticulous attention detail define every facet of our operations. At VVR we craft exceptional qualitative and quantitative research journeys from beginning to end. At VVR, we are the IHUT experts because we provide the following: single point of contact, study design and consultative services, screening and questionnaire development, high-quality local and national recruiting/screening, packing and shipping to your exact specifications with a dedicated expert team, daily/ weekly/timely recruiting and shipment tracking updates, reminders and follow-ups, customer/consumer support, data collection, tabs, analysis and full reports, post-use qualitative interviews (if desired).

E-mail slally@variousviews.com Phone 1-513-387-2232 www.variousviews.com



How likely are you to recommend this article?

| By Chris Hauck



abstract

Chris Hauck explores an approach to rethinking how companies ask about loyalty and satisfaction. or many years, Net Promoter Score (NPS) has been the gold standard among marketers for assessing customer perspectives on a company with one simple question: "How likely are you to recommend this product (or service) to a friend or colleague?"

The concept of NPS is undoubtedly intriguing – a single query that promises sustainable growth through exceptional customer experiences. However, we must reflect on our approach and if we've been doing justice to this concept. In today's rapidly evolving business landscape, it's crucial to consider whether your NPS surveys truly serve the purpose of understanding your customers and fostering loyalty.

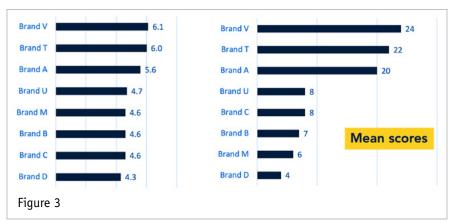
The current practice of incessantly asking them to rate their likelihood of recommending a company has become so routine that respondents often have an automatic score in mind. During a recent trip, I received over 40 unique NPS survey requests, most of which used a 10-point scale. Consequently, I handed out numerous 8s to a hotel chain, a rental car company and an airline without genuinely considering the quality of their service. In a world where only extreme ratings seem to matter, Likert scale questions have lost their effectiveness in understanding the nuances of customer loyalty. Using such a blunt instrument to gauge complex human emotions often results in unchanging or erratic data, which should not be the basis for crucial decisions or executive bonuses.

The real issue isn't NPS itself but the basis of most marketing research designs, the Likert scale. This approach was developed in the 1930s by Rensis Likert, an American social scientist and professor of psychology at NYU who developed his numeric scale to measure people's attitudes and feelings on a scale that was easy to apply and understand. That scale can be anchored, in which case the respondent is asked to rate something in descriptive terms, such as very satisfied, satisfied, neither, dissatisfied and very dissatisfied. Numbers are assigned to these statements in order: very dissatisfied = 1, very satisfied = 5. Further evolution of the scale is simply asking people on a scale from 1 to 5, where 5 means very satisfied and 1 means very dissatis-

fied. The scale can be 5, 7, 10, 11 or any number you choose. The point is that many marketing research surveys now simply use a Likert scale question as the most important measure of respondent attitude, including, in this case, the NPS. It's asking people to rate their attitudes and feelings numerically and expecting the outcome to be anything other than outdated and random.

In April of this year I decided to run a test. In conjunction with and with the kind support of Brad Jones of YouGov, my firm did an experiment in which we compared a Likert scale design used in the NPS approach (control cell) to my Sort & Score design (test cell), which introduces a competitive context without a scale. (Sort & Score is an approach that I use when most people use MaxDiff.)

Each recruited respondent was equally likely to be in either the control or the test cell. The most stringent pharmaceutical testing uses this approach to confirm the viability of a new medication. Experimental design is the basis of the scientific method and the best way to compare two different methodological approaches.



In this simple test-and-control design, the variable being analyzed was the amount of differentiation between attributes compared between cells. Our hypothesis was that differentiation in the measures would be significantly greater in the test cell, proving our view that another approach to data collection would produce differentiated and more meaningful results (Figure 1).

Our first observation was that our Sort & Score approach performed better than the series of Likert scale questions on YouGov's survey experience satisfaction scale. Please note that we recognize that we have used a Likert scale here to compare the two respon-

Sort and Score

Likert

dent experiences. We also recognize that the test cell approach takes longer for respondents to complete. In our view, the test cell exercise takes more thought than completing a series of repetitive Likert scale questions — and that thought makes all the difference.

Traditionally, the NPS question is only asked of the brand of interest. To provide a comparative format, we asked the same NPS question of key brands in the mobile telephone service industry: How likely are you to recommend each of these brands to a friend or colleague (Figure 2)?

Note that in the research with respondents, we used real brand names to offer an authentic experience for the end user but here we have disguised the brands, as that isn't the point. The point is that the data looks very different when the respondent is engaged in a more complex exercise that is set in a competitive context. There is greater differentiation across attributes at the aggregate level than when you ask individual Likert scale questions (Figure 3).

This experiment proved that the traditional Likert scale approach is less effective in showing differentiation

Figure 1	(control)	(test)
U.S. nationally representative sample of adults provided by YouGov	n=589	n=581
Average survey length in minutes	6.9	9.3
YouGov survey satisfaction: One last thing before you go. How was this survey experience? 1. Excellent, 2. Good, 3. Fair, 4. Poor.	Mean=2.5	Mean=1.5

Figure 2 Likert Scale (control) Cell Sort and Score (test) Cell

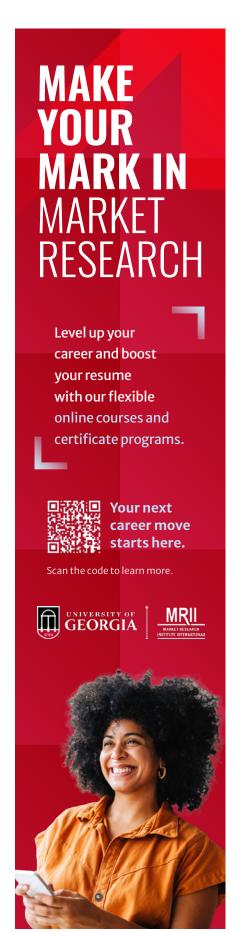
Question sequence

On a scale from 1-10, where 1 means not at all likely and 10 means very likely, how likely are you to recommend each of these brands to a friend or colleague?

[PRESENT EACH BRAND ONE AT A TIME]

Q1. Please sort these brands from most likely to recommend to a friend or coworker to the least.

Q2. Please allocate 100 points across all these to show how likely you are to recommend each brand. If your top brand is the only one you recommend, give it 100 and the rest a 0. If you are equally likely to recommend, share the points. Just remember that you can't allocate more points to a lower-ranked item.



across the brands than the Sort & Score design.

The original promise of NPS - asking our customers one question that offers a path to true business growth through sustainable "good profits" derived from consistently delivering a customer experience worthy of loyalty - was inspired. But what if we have been asking the question the wrong way? And then we got into the habit of asking that poorly crafted question at every interaction, all the time, under any circumstance and after every experience. And using that mediocre data to justify bonuses and decisions throughout the company. A fresh perspective on NPS surveys is essential and an alternative approach that introduces competitive context into the equation can be very productive. The test Sort & Score approach, which ranks and values brands relative to each other, aims to bring a new understanding to an overused measurement. Sort & Score isn't the only way to introduce a competitive context to NPS but it is my preferred approach.

Genuinely connect

It's time to admit that customers have developed standard responses to NPS surveys under most circumstances. Regardless of the service quality, we all have our go-to scores on a 10-point or 7-point scale. This overused and uninspired approach diminishes the survey's value. But rather than dwelling on the negative aspects, let's explore how we can refine our NPS survey methodology to genuinely connect with our customers and elevate our decisionmaking process. It's common for companies to treat NPS data as gospel but it's important to acknowledge that it can be inherently noisy. Tracking NPS data without recognizing its complexity can lead to misguided decisions and erratic tracking data.

What's crucial is that we consider our customers' experiences in a competitive context. Placing the NPS question within such a framework can significantly enhance the survey's value. You gain actionable insights by comparing your performance to your industry competitors. A competitive context is a measurable and easy-to-implement fix to the stale NPS Likert scale-based data. The additional consideration increases the thought process for customers completing your NPS survey. Using a competitive perspective allows the analyst to answer the question of whether any of this matters.

Let's illustrate this with a couple of examples:

- Imagine your brand has the highest likelihood of recommendation in the industry but your competitors are close behind. In this scenario, it's essential to identify opportunities for differentiation and invest in those
- Suppose your brand still leads but your competitors lag far behind.
 In this case, you can strategically maintain your differentiation while ensuring the quality of your current offerings.

Understanding your relative position compared to competitors is far more valuable than fixating on your NPS score, especially in a world where most companies receive similar scores. This competitive context not only adds value but also enables more informed decision-making.

Business leaders are likely ready for a more nuanced alternative to understanding customer preferences and loyalty. By embracing a more elegant and competitive approach to NPS surveys, we can improve the quality of our decision-making and create a more engaging experience for our customers. ⁽¹⁾

Chris Hauck is president of HauckEye LLC and SCORE Metrics LLC. He can be reached at chris@hauckeye.com.

Had Enough?

Executive Recruiting for Rising Stars in the Marketing Research and Insights Industry

FULL-TIME, PART-TIME or CONTRACT PLACEMENT



Do respondents take us seriously?

| By Stephen J. Hellebusch



abstract

Stephen J. Hellebusch reports on some research on research that involved asking survey-takers to indicate their age twice during the questionnaire.

ecently, I wondered again about how many people are spoofing us when they fill out an online questionnaire. Coincidentally, an article dealing with data quality appeared in the May/June issue of Quirk's. "A threat, not a crisis," by Mike Booth of InspiredHealth, describes what may occur if bogus respondents slip into our research. He describes in some detail the four categories of quality control that can be applied: device-and-browser-specific signals; survey-specific behavior; content of survey responses; and the broader survey-taking environment. Hopefully, most reputable interviewing companies employ these controls.

Among the survey-specific behavior Booth mentions are attention traps, including providing a setup that could lead to contradictory answers. It is that type of issue with which this short article is concerned.

Years ago, as a marketing research vendor, I had a client who was willing to indulge me in asking respondents' exact age both at the start and at the end of a 15-20-minute survey. In those early days of internet interviewing, 6% of approximately 350 people changed their exact ages from the start to the end of the interview. That seemed very high to me, so I ran the crosstab of exact age pre (asked as the first or second question) by exact age post (asked as the very last question). Almost everyone fell close to the diagonal.

There were 4% who gave ages the second time that were within a year of the age they gave the first time. But 2% changed age drastically, going from, for example, 35 years old to 65. It was concluded that those 2% of respondents were just "messing with" those of us conducting the interview. Given what we know now of those early days, this may have been an underestimate. But, as an aid in interpreting most survey results, it was acceptable; it just needed to be factored into the conclusions.

Here we will summarize the results of a second study conducted this year to see if things had changed with online interviewing.

OBJECTIVE

The objective is to see what percentage of those completing an online questionnaire will claim different ages at the start and at the end of a 12-minute self-administered online interview.

RESEARCH DESIGN

Sample

The sample was 500 people from a large national database of consumers, with many controls to assure quality; interviewing was balanced to match the U.S. population on age and sex. It occurred in mid-January 2024.

Method

In the online interview, in order to match the U.S. population, the first question, which asked each respondent age, used categories.

QAge: Please indicate which option best represents your age?

(Bracket indicates "Quota")

- a. Under 20 [Term]
- b. 20-29
- c. 30-39
- d. 40-49
- e. 50-59
- f. 60-69
- q. 70 +

The second one, at the very end of the interview, asked exact age.

8. How old were you on your last birthday? {Numeric} {1-99}

Record here: _____

Results

Seven people gave exact ages that fell outside of their age categories. That amounts to 1.4% of the 500, very similar to the 2% found in the prior test.

Two people 20-29 were 19. Two people 30-39 were 40-49. One person 40-49 was 50-59. No one 60-69 was different than 60-69. No one 70+ claimed to be younger than 70.

CONCLUSION

The limitation in this research is that the first question used age categories rather than exact age. Given this, the 1.4% may be an overestimate of the number of spoofers, assuming one is willing to discount those whose secondquestion age is within a year of the originally claimed age.

It seems that when the key differences in survey results are greater than 8%-10% and statistically significant at the planned confidence level, this amount of "noise" in the system can be ignored. If the difference is slight, but still considered statistically significant, one might prefer to explore further, or at least not rely heavily on the conclusions. Of course, this thinking depends a great deal on the base size of the subgroups being examined. ①

Stephen J. Hellebusch is a semi-retired consultant at HellRC. He can be reached at steve@hellrc.com.

There's a lot on the line.

MANAMAMAMAMAMAMA



TELEPHONE DATA COLLECTION

CATI • B2B/B2C • LOW INCIDENCE • ONLINE RESCUE

1.800.743.6443 • telepoll.net



They love me, they love me not

How valued are internal marketing research departments?

| By Marlen Ramirez



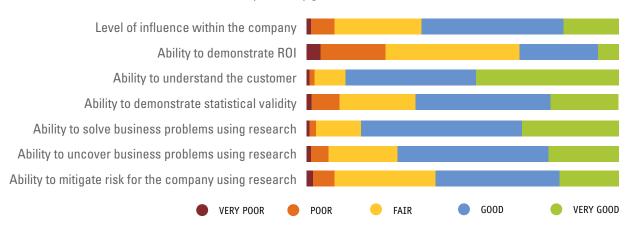
Findings from the Q Report, an independent study, written for and developed with the help of client-side marketing research and insights professionals

abstract

Q Report survey respondents feel their insights teams are appreciated by co-workers and management but it's hard to define the criteria by which their performance is measured. hile many researchers are justifiably confident of the value they bring to their companies, are those views shared by other internal teams and their company as a whole? The survey for the 2024 Q Report asked respondents for their thoughts on the key metrics they are judged on and their sense of their standing within their organizations.

How would you rate your company's marketing research function on the following fronts?

Most respondents rate their organization's marketing research function as "good" or "very good." Nearly half (46%) say the insights department is "very good" at understanding the customer and 48% say it is "good" at uncovering business problems using research. However, when it comes to the ability to demonstrate ROI, 43% say it is fair, 21% believe it is poor and 4% say it is very poor.



THE **Q** REPORT

What are the key metrics against which your marketing research function is judged?

Researchers say many of the key metrics they are judged on are based on numbers – of dollars spent or unspent in a budget, of projects completed in a quarter or a year, of days/ weeks/months needed to complete a project.

Speed, accuracy of data, customer service as an internal service function to the company, ability to stick to budget.

Availability of data to answer business questions in timely and effective way – data at our fingertips to prove the impact of marketing.

Tangible, actionable insights, new product development and ultimately new distribution and sales.

This is an interesting one as there is not a formal metric, it's more about demonstrating impact. It's more the other way, our team is responsible for coming up with targets for the business and measuring them (e.g., around reach and impact), influencing business strategy (around half of the business objectives for the year have come from the research team).

We don't have specific ones for insights but we are expected to contribute to the overall success of our business unit's OKRs around revenue/sales, customer acquisition/retention, etc.

Others indicate that they are judged on less-definable criteria and their ability to answer questions effectively to move the business forward.

Our metrics are more qualitative in nature — building our brand, strengthening relationships across the organization, bringing the customer to the center of all decisions.

[We are measured on the] extent to which market/customer insights are used to drive development of business strategies and tactics.

I don't know that there are specific key measures but rather having senior leaders personally value the work and understand that it has helped them navigate the business forward.

Uncovering key insights that help drive action or answer questions; ultimately the goal is driving focus.

It is all qualitative. Did we help push through key initiatives? Did we achieve our marketing objectives — which are usually more descriptive than metric-based.

Some respondents are unsure of the ways their performance is assessed.

Do not really get judged but I am also not sure how much sway our research insights have on business decisions as a result of that.

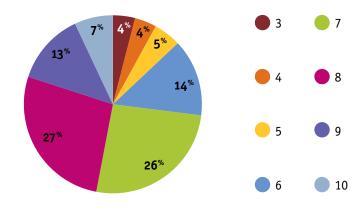
People want data-driven insights but often only if the data fits their strategy or agenda.

There are no clear metrics for this. If anything, we are viewed as adding value when it comes to validation research. Not sure we get any credit/recognition for the more strategic work that can really shape and transform the business. And upfront strategic work is much harder to embed. The organization I work at talks a lot about human centricity but gives themselves credit in this space if we can check the box on doing a BASES or PRS test.

Since market research is a shared service within my organization, I often don't hear how the stakeholders applied insights and how these insights affect our business. Therefore, it is challenging and ambiguous.

How valued do you think the marketing research and insight function is at your company?

1 = not valued at all, 10 = extremely valued



When asked how valued the marketing research function is internally, over half of respondents say their company is a 7 or higher on a 10-point scale of "not valued at all" to "extremely valued."

Our team is always involved in decisions made at board-level, our work is referenced and shared across the business as we always provide insights based in commercial understanding/reality which I believe is useful for the teams.

Extremely valued. The head of research sits on the leadership team. Research has driven a large share of strategy. The team has been protected from staffing cuts due to the value it provides and is consulted regularly for decision-making.

The company is very appreciative and reliant on the insights function at this company, which goes much beyond traditional market research to include competitor market insights, industry trends and sales forecasting.

THE **Q** REPORT

And then there are those who feel their teams are overlooked and underappreciated.

My company highly utilizes market research but I don't feel like my team receives the same rewards in terms of raises/promotions/salaries as compared to the marketing team.

Research is not given importance at all.

As there is no research and insight function, the idea of research and insight is valued highly but it is not a priority in terms of staffing or budget for projects — so not really valued, I guess.

Market research is an afterthought – it is rarely something that is considered in a plan up-front.

Elsewhere, the takes were more nuanced, citing instances where companies pick and choose when they laud the insights team.

It's a 10 when management needs research for something. It's a 0-2 when you ask management to properly resource the marketing research and insights function. Average of the two = 5-6.

While the results are highly valued, investment in growing the department has been stagnant. Mixed signals on how valued the function really is.

Our team is very experienced and our work is held in high esteem. However, research is not central to our group's mission and will never be as valued as other functions.

At the end of the project, when we deliver results, our internal clients are always incredibly pleased and complimentary of our work. But I feel that there's a strong general sense across the business that anyone can do research and that this is not a specialized area of expertise (e.g., the "market research analyst" job title was eliminated and replaced with simple "data analyst"; leaders are hired to lead research team with little to no market research background; new hires are brought in with zero research background and thrown into

the trenches on major research projects, usually being set up for failure due to not even understanding the basics of a survey questionnaire).

There's a strong sense that our function could be easily replaced by outside vendors. Although we have many great partnerships, the vendors do not understand the business like we do and often are overworked to the point of needing babysitting to catch at times the simplest of data quality concerns (incorrect programming, inconsistency between waves, etc.).

They say research is everything and the most important part of our business but they treat us as a support function.

By the marketing team (which we support), it's a 10. By the overall company? A 6 may be stretching it. Everyone talks about how important it is but the unwillingness to increase our budget or think outside the box seems to contradict that.

And then there was this researcher, perhaps enjoying a sensation that every insights professional would secretly love to have.

Research is very valued and increasing in value. There are still obstacles that we run into — in part because it's so valued that there is also fear of it. ①

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 June 17 to July 23, 2024. In total we received 1,504 usable qualified responses, of which 502 were from end-client researchers and used for this end-client report. An interval (margin of error) of 2.49 at the 95% confidence level was achieved for the entire study. (Not all respondents answered all questions.)



Read More, Guess Less: The Research Professional's ESSENTIAL LIBRARY

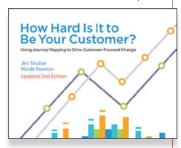
How Hard Is It to Be Your Customer?

Using Journey Mapping to Drive Customer-Focused Change

Updated and expanded 2nd Edition

This top-selling book on journey mapping has helped thousands of CX research professionals and business leaders plan

and execute successful journey mapping initiatives. With insights from CX pros, extensive research, and real-world case studies and examples, you are guided through the process of creating and using journey maps. An added chapter in this new edition focuses on software tools, and the ability to create living journey maps.



208 pages, 11x8.5, 978-1-941688-75-5 \$42.00 paper/color illustrations

Moderating to the Max

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

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

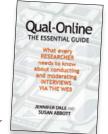


160 pages, 7x10, 978-0-9830436-2-1 \$34.95 paper

Qual-Online: The Essential Guide

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

This extensive guide will help you understand the sequence of steps to follow, timing, and costs involved and help you manage all of the useful insights you will gather—making your job of sharing information with your client that much easier and your reports more robust. The must-have guidebook.



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

Stir It Up!

Recipes for Robust Insights & Red Hot Ideas

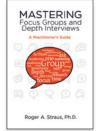
Here are 50 fresh ideas for exercises in an easyto-use cookbook format. Organized by category, from Ice Breakers to Idea Developers each "recipe" (exercise) is presented with a brief description, an estimation of time required, a list of materials, instructions for how to do it, and useful tips.

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

Mastering Focus Groups and Depth Interviews

A Practitioner's Guide for Moderators and Interviewers

A practical handbook of insights, tips, and wisdom focusing on six applications for depth methods, focus groups and depth interviews that can be used for much more than preliminary research and ideation exercises with valuable advice for integrating qualitative and quantitative research. Recommended for professionals in market research, product development, government, sociological practice and public policy research.

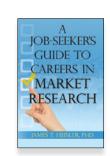


(238 pages, 978-1-941688-66-3 \$24.95 paper)

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

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

An authoritative guide to the market research industry at the beginning of the 21st century, its size and scope, what value it provides, who works in the field, who uses it and for what decisions, the market research process, common methodologies,



Questionnair

NATION OF

growth prospects for the industry, and more. The book explores market research as a career choice—skills, education, and training; how to get that first job, moving upward, potential earning power, success profiles, and stepping stones to related careers.

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

The Complete Guide to Writing Questionnaires

How to Get Better Information for Better Decisions

A comprehensive framework for creating guestionnaires from planning research to support decision-making, conducting qualitative research, and planning the Complete
Guide to Writing questionnaire before you begin writing questions,

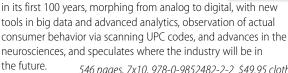
with guidelines to make questions clear, answerable, easy, and unbiased for the three most common tasks researchers ask respondents, and how to properly pretest a questionnaire.

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

A Nation of Numbers

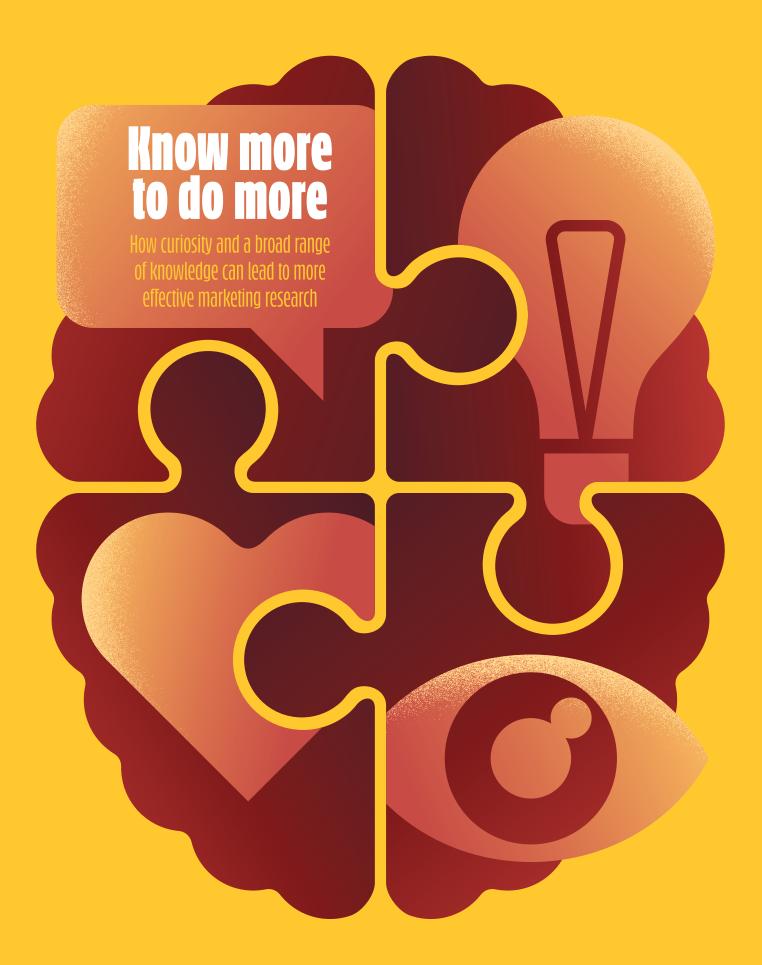
The Development of Marketing Research in America

Explore the factors and events that came together to make America the birthplace of marketing research. Scipione documents how far the marketing research industry has come



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

Most PMP books are also available for e-readers. For more information on any title listed here or to see a complete list, visit our website or call 607-275-8100.



Just as other disciplines are finding value in combining with and drawing from a range of other related and unrelated fields of study, so too can marketing researchers benefit from seeking out and staying open to new viewpoints and ways of thinking.

By Terry Grapentine and David Soorholtz

here is an increasing trend in the "hard" and "soft" sciences toward multidisciplinary research – a technique in which researchers use concepts, theories and tools from diverse disciplines to make new discoveries. For example, the field of climate science collaborates with meteorology, oceanography, geology, environmental science and physics in developing climate models.

This trend materialized because many hard science (e.g., physics and chemistry) and social science questions "are multicausal, multidimensional and resistant" to being explained by a single discipline. Consequently, multidisciplinary research gives better explanations and more accurate predictions of phenomena.

We observe this trend in marketing. For instance, the Yale School of Management offers a master's degree in behavioral economics, "rethinking marketing and insights with...behavioral economics immersion."2 Premier textbook publishers now often merge marketing with non-marketing domains into multidisciplinary marketing textbooks. Recent examples are Elsevier's "Consumer Neuroscience: Theory and Application," Routledge's marketing-oriented textbook, "Behavioral Economics,"4 and "Advertising and Anthropology: Ethnographic Practice and Cultural Perspectives."5

What are the implications of this evolution in marketing? We argue that effective future marketers and marketing researchers will greatly benefit from a foundational understanding of various non-marketing fields that are increasingly influencing marketing. This is because integrating knowledge from these areas can enhance our ability to explain and predict consumer behavior more accurately.

To support our argument, we discuss the following: a) multidisciplinary research, consilience and background knowledge; b) how background knowledge enhances critical and creative thinking; c) two marketing research examples of consilience; and d) how to gain background knowledge.

Multidisciplinary research, consilience and background knowledge

First, a few definitions. Multidisciplinary implies the alliance of specialists from different knowledge domains working together on a research project. In contrast, consilience is the endeavor to unify different knowledge domains at a conceptual level. It is based on "the principle that knowledge from different disciplines or sources, when inte-

grated, strengthens our understanding of a particular phenomenon or concept. It suggests that diverse areas of inquiry can converge to provide complementary insights, resulting in a more comprehensive and cohesive understanding."⁶

The textbooks

we cited above are
examples of consilience – unification of
a marketing and nonmarketing domain. Case studies of using this unification to conduct research
found in these textbooks are examples
of multidisciplinary research.

In his book, "Building Background Knowledge," Robert J. Marzano describes background knowledge as one's knowledge and understanding of a subject area. Knowledge and understanding, however, are not the same. One may know, for example, that a brand's market image has declined (knowledge) but not necessarily know how that came about (understanding).

How background knowledge enhances critical and creative thinking

Critical thinking: See Figure 1, which comes from Paul van den Broek's study of cognitive processes and knowledge representation, in the highly respected journal Science. The black circles represent prior background knowledge. Blue circles denote new background knowledge and red circles signify corrected misconceptions of one's background knowledge.

Effective future marketers and marketing researchers will greatly benefit from a foundational understanding of various non-marketing fields that are increasingly influencing marketing. This is because integrating knowledge from these areas can enhance our ability to explain and predict consumer behavior more accurately.

These various kinds of knowledge are the effects of learning new material across a diverse collection of related knowledge domains and consequently expanding one's vocabulary and factual learning. For example, new idea #24 modifies prior knowledge in #2 and #16. Corrected misconceptions in #5 relate to prior misunderstandings in #4.

Contemplate for a moment how your acquisition of new knowledge in marketing or marketing research over time has added to, modified or corrected your background knowledge.

The more you learn, the more you know. The more you know, the more you revise background-knowledge misconceptions. The more you do this the better critical thinker you are.

Creative thinking: Rice University music professor Anthony Brandt and David Eagleman, a neuroscientist at Stanford, discuss creativity's basis – the brain – in their book, "The Runaway Species: How Human Creativity Remakes the World." They hypothesize that the creative process manifests itself in three ways: blending, breaking and bending.

Blending: This concept involves integrating different ideas or elements to create something new and innovative. In marketing research, blending might refer to combining diverse research methods when interviewing respondents one-on-one. For example, to examine the issue of how attributes influence decision-making, have respondents evaluate a list of product

attributes using conjoint analysis, rank order the attributes in terms of preferences and pick the preferred attribute in a series of paired comparisons. Then compare results. Probe for inconsistencies in how respondents answered these questions.

Breaking: "In breaking, something whole...is taken apart and something new assembled out of the fragments."

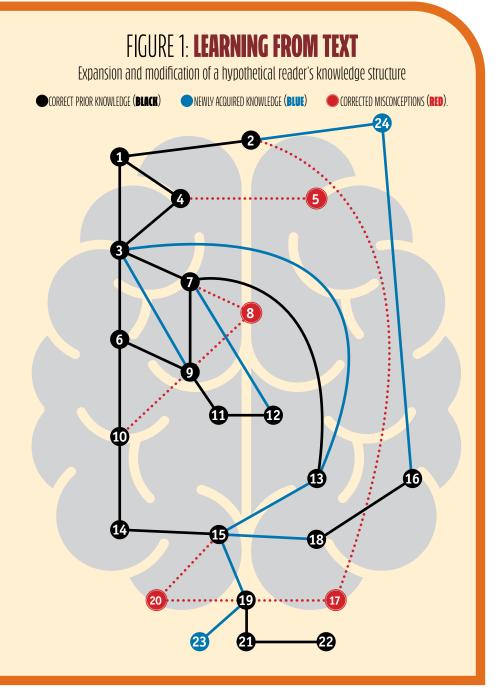
A research example is having focus group participants take apart four different lawnmowers. Then they are instructed to assemble their ideal lawnmower from the "best parts" of each of the four lawnmowers.

Bending: Think of bending as stretching or shrinking a concept. For instance, consider stretching or shrinking a liquor brand concept. Behavioral economics tells us that a brand's image, in part, can be affected by where a brand is placed on a shelf. Its image can be stretched or shrunk based on where consumers find it in a liquor store.

Consider the grain alcohol brand category (e.g., Everclear, or the popular Polish brand, Zbyszek). Our experience in doing alcohol research shows, in a hypothetical example, that the perceived image of Everclear differs in retail liquor stores when Everclear is placed next to moonshine rather than to vodka. Everclear projects a more positive image, associated with a greater number of positive drinking occasions (i.e., stretching) in the latter than in the former. Also, it sells more when placed next to vodka.

This idea of a brand's image being affected by brands it is placed close to is called the proximity principle in consumer neuroscience. The proximity principle states that those visual elements that are spatially proximal (e.g., adjacent to each other) are likely to be grouped together and classified as a single percept or object."9

What produces this creativity in the above examples? Eagleman asserts that the brain does this subconsciously by relying on memories. The brain mines memories associated with a certain goal and percolates up creative solutions for us to evaluate consciously. We are beneficiaries of this evolutionary process, whose primary function is to save our skins in an emergency. (See sidebar.)



Consilience: Two marketing research examples

Consilience occurs at the conceptual (i.e., development of individual concepts) and theoretical levels (i.e., relations among the concepts). We give two examples, one drawn from neuroscience and marketing research and a second from philosophy of science, psychometrics and marketing research. In both cases, we take concepts from two different knowledge domains and attempt to unify them.

Neuroscience + marketing: The concept of expectations can be found in both neuroscience and marketing. How can they be unified and then applied in a marketing research study? We discuss how this is done, based on a 2023 Quirk's article written by Grapentine."

From marketing: Referring to Figure 2, Gilbert Churchill and Carol Surprenant define P - E as the difference between the pre-purchase expectation (E) and the post-purchase perceived performance (P) of a set of product attributes. Expectation is defined as a forecast of perceived product performance for a given attribute. For instance, in evaluating a customer's expectation of waiting in line for a bank teller, the customer may forecast they will wait 4 minutes, E = 4 minutes. If they wait 3 minutes, then P = 3 minutes. Therefore, in this case, P - E = 4 - 3 = +1. Positive differences in P - E increase satisfaction and negative differences decrease satisfaction.

From neuroscience: Based on data from brain scans and placing electrodes inside the brain, neuroscience has discovered what is called the brain's reward system or reward pathway. If a consumer is presented with a valued but unexpected (unforecasted) reward, then the reward pathway is unconsciously activated or spiked, releasing the neurotransmitter dopamine. In this instance, dopamine produces a pleasurable emotion in your brain. If P - E = (a negative number), the brain produces other transmitters making one feel displeased.

Consilience: Conceptually, satisfaction for marketers is based on answers to questions on a survey that allow for the calculation of P - E. In neuroscience, satisfaction is a mental state.

Research shows that there is a high correlation between the two.

So, what can a researcher do with these findings? How can consilience between these two knowledge domains be achieved? We offer two suggestions.

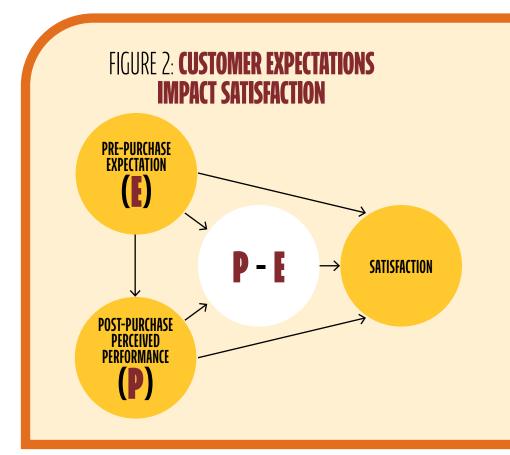
• First, develop survey questions that operationalize "expectation" as a forecast of perceived product performance on an attribute. In other words, clarify for respondents how they should interpret the term "expectation." Our experience shows that researchers do not do this.¹²

Consequently, different respondents interpret "expectation" differently. Some may interpret it to mean a forecast, as the marketing literature and neuroscience assert. Some others may interpret it to mean the level of product performance that aligns with what they think they deserve. Still others may interpret "expectation" to mean their minimal acceptable level of attribute performance. Respondents interpreting this term differently introduce significant levels of measurement error in the data.

Second, neuroscience has validated the physiological basis for "exceeding consumer expectations," where expectation is a forecast of product performance. Therefore, leverage this knowledge through exploratory research and market testing to identify product performance attributes that spike a consumer's reward system. For example, a major cruise line discovered that one of the most pleasant experiences for customers is being surprised by having towels in their room and napkins at dinner folded in the shape of an animal - towel origami.

Philosophy of science + psychometrics + marketing: Marketing researchers deal with concepts such as customer satisfaction, product quality and brand purchase intentions. Researchers often measure these concepts with one or more attributes.

But our experience tells us that they do not use the same methods recommended in the non-marketing fields of philosophy of science and psychometrics. Philosophy of science studies how science creates knowledge. Psychometrics studies how to



measure psychological constructs (i.e., the theory of measurement) such as IQ or brand image. In this example, consilience is borrowing from these two non-marketing domains to improve the creation and measurement of marketing concepts.

Books have been written on this topic. Consequently, our discussion here will be brief and somewhat simplified with endnotes for interested readers to do research on their own.

Philosophy of science tells us that all concepts have "intensional" properties.¹³ A concept's intensional proper-

ties are all concept characteristics that potentially could be translated into attribute ratings on a questionnaire. For instance, properties of the concept "future brand purchase intention" might include characteristics such as a) the consumer's stated probability of repurchasing Brand X within a given period, b) the perceived ease or difficulty of finding a substitute for Brand X, and c) an overall attitude, positive or negative, toward Brand X. The universe of all such properties is called a concept's domain.¹⁴

Here is the dilemma for researchers: The number of properties in a concept's domain is always greater than the number of properties that a researcher can realistically translate into attributes on a questionnaire.

Here's where consilience can help: Psychometrics can guide the researcher in identifying a smaller, core set of properties to be translated into attributes on a questionnaire via a method called confirmatory factor analysis. Philosophy of science also addresses this issue via the idea of a concept's core properties.¹⁵

How to gain background knowledge

As marketing researchers, we do not have the time or funds to earn university degrees in all the social sciences and neuroscience that are informing marketing and marketing research today. What to do? We offer four suggestions: identify pertinent domains of study, purchase relevant college textbooks in these fields for reference, use Google Scholar and expose yourself to these new knowledge domains.

Relevant fields: Table I lists formal fields of study that are informing marketing and marketing research currently and which you may want to read about.

Reference books: Some textbooks we recommend are as follows:

- Behavioral economics: Adams, Julian (2023). "Behavioural Research for Marketing: A Practitioner's Handbook," Routledge Taylor and Francis Group, London and New York.
- Neuroscience and marketing: Zoëga, Thomas R. (2015). "Introduction to Neuromarketing and Consumer Neuroscience," Neurons Inc.
- Anthropology: de Waal Malefyt, Timothy, (2023). "Business Anthropology: The Basics," Routledge Taylor and Francis Group, London and New York.
- Critical thinking: Dwight, David, et al. (2017). "Critical Thinking For Marketers: Learn How To Think, Not What To Think," Business Expert Press.

Google Scholar: This will be one of your best resources. Type in relevant search terms (e.g., type in "behavioral economics and [your industry of inter-

TABLE 1: NON-MARKETING DOMAINS INFORMING MARKETING RESEARCH

MAJOR DOMAIN	SUB-FIELDS	EXAMPLES OF MULTIDISCIPLINARY RESEARCH
	Cultural Anthropology	How culture influences consumer behavior.
ANTHROPOLOGY	Kinesics	This field crosses over into anthropology and linguistics. It studies non-verbal communication, informing the process of interviewing and observing consumers.
BEHAVIORAL ECONOMICS	Applied behavioral economics in marketing	The study of the psychological, cognitive, emotional, cultural and social factors involved in the decisions of consumers or marketing institutions and how these decisions deviate from those implied by classical economic theory. **
COMMUNICATION SCIENCE	Marketing communications	Marketing communications, sometimes called marcom, are the combinations of promotional tools, marketing channels, messages and media that marketers use to communicate with their target customers. ¹⁷
DEMOGRAPHY	Marketing demographics	Examines how changing demographics can explain past, current and future changes in consumer behavior.
MARKETING HISTORY	History of marketing successes and failures	Case studies of marketing successes and failures.
NEUROSCIENCE	Neuromarketing	"the application of neuroscientific methods to analyze and understand human behavior in rela- tion to markets and marketing exchanges." 18
PHILOSOPHY OF SCIENCE	Epistemology	Explains how science creates knowledge.
PSVCHOMETRICS	Psychometrics in the social sciences	The nature of measurement relating to defining concepts and their validity and reliability.

est]"). Often, you can obtain free PDF copies of referenced academic articles at the web site, sci-hub.st.

Expand your learning: In short, read a lot. Be curious. Expose yourself to new domains informing marketing. Go to conferences. Take courses (in person or online) on relevant topics. Listen to YouTube videos and podcasts. Get to know professionals who work in other disciplines. Brainstorm creative ideas with colleagues.

Know more about more things

Aristotle's axiom "The more you know, the more you realize you don't know" rings true in most facets of our personal and business lives. However, in marketing research we have also found that the more you know about more things, the better. In an industry that (justifiably) rewards depth of knowledge in specific areas such as advanced methods or social science, we have found that having broad, general knowledge about many related disciplines is also advantageous.

Terry Grapentine and David Soorholtz are independent marketing research consultants. They can be reached at tgrapentine@gmail.com and david@vetsense.biz.

REFERENCES

- 1 Hesford, Wendy S. (2021). "Cross-disciplinary impact and influence," The Ohio State University, College of Arts and Sciences, retrieved at: https://globalartsandhumanities.osu.edu/news/impact-and-influence
- 2 Novemsky, Nathan (2024). "Rethinking marketing and insights with Yale: Behavioral economics immersion," Yale School of Management, retrievable at: https://som.yale.edu/centers/centerfor-customer-insights/conferences-events/rethinking-marketing-and-insights-behavioral-economics-immersion
- 3 Jansson-Boyd Cathrine and Peter Bright (2023). "Consumer Neuroscience: Theory and Application," Elsevier, New York.
- 4 Cartwright, Edward (2024). "Behavioral Economics," Routledge, New York.
- 5 De Waal Malefyt, Timothy (2012). "Advertising and Anthropology: Ethnographic Practice and Cultural Perspectives," Routledge, New York.
- 6 Chatgpt.com, "Define consilience."
- 7 Marzano, Robert J. (2004). "Building Background Knowledge for Academic Achievement," Association for Supervision and Curriculum Development, Alexandria, Va., p. 1.
- 8 Brand and Eagleman, p. 74.
- 9 Jansson-Boyd, Cathrine V., p. 61.

10 Ibid., p. 45.

- 11 This discussion is taken from Terry Grapentine's article, "Hardwired for satisfaction," Quirk's Marketing Research Review," https:// www.quirks.com/articles/use-neuroscience-tofine-tune-your-customer-expectations-strategy
- 12 Grapentine, Terry (2003). "Problematic scales: When measuring quality, expectations scales exhibit several drawbacks," Marketing Research, Fall 2003, pp. 16-19.
- 13 Teas, R. Kenneth and Kay M. Palan (1997). "The realms of scientific meaning framework for constructing theoretically meaningful nominal definitions of marketing concepts," Journal of Marketing, (61)2, April, pp. 52-67.
- 14 Peter, Paul J., and Gilbert A. Churchill (1986). "Relationships among research design choices and psychometric properties of rating scales: A meta-analysis," Journal of Marketing Research, (23) 1, (February) pp. 1-10.
- 15 Bunge, Mario (2009). "Philosophy of Science: From Problem to Theory," Transaction

- Publications, New Brunswick, N.J., p. 79.
- 16 Wikipedia: https://en.wikipedia.org/wiki/Behavioral_economics
- 17 University of Lincoln, department of market-

In marketing research we have found that the more you know about more things, the better. In an industry that (justifiably) rewards depth of knowledge in specific areas such as advanced methods or social science, we have found that having broad, general knowledge about many related disciplines is advantageous.

ing: https://online.lincoln.ac.uk/what-aremarketing-communications/

18 Lee, Nick et al. (2007). "What is 'neuromarketing'? A discussion and agenda for future research," International Journal of Psychophysiology, 63(2), p. 200.

CREATIVITY AND THE BRAIN

Based on Brandt and Eagleman's book and conversations Grapentine has had with Eagleman, we offer a few observations on the brain and creative thinking.

- The brain's prefrontal cortex (behind your forehead) is the engine driving creative thoughts. Thank evolution.
- We all are creative thinkers! The brain is creatively thinking subconsciously, all the time.
- The creative output one sees in the sciences and arts uses the same brain processes.
 Metaphorically, this process is called the three Bs: blending, bending and breaking.
- There are no totally new ideas. All creative thoughts are based on your (i.e., your brain's) total life experiences.
- Want to be a better creative thinker? Expose yourself to novel ideas and experiences.
 They stimulate neural pathways related to creative thinking. So, go ahead, visit a country you have never been to, read a novel you have meant to read but never made time for, explore new cuisines.
- Do art. Art is an overt process of bending, breaking and blending. It strengthens neural pathways related to creativity.

••• the business of research

Scaling insights

How AI will transform research agencies and their offerings

| By JD Deitch



abstract

AI is fundamentally changing the role of the researcher, eliminating labor as a prerequisite for growth for insights firms. In doing so, it will completely alter how these companies go to market and create value for clients and shareholders.

Artificial intelligence is causing a tectonic shift in the way research is conducted and research firms function. This is not merely a change in technology, as we witnessed with the internet and mass adoption of smartphones. It is far more profound. AI is redefining what researchers do and what they need to know, transforming them from hands-on operators to strategic overseers and product developers.

What does it mean for the industry when AI can take on every phase of the research process and perform the work of a massive research team? Let's explore how work is done in traditional firms and compare it with the cutting-edge, equally competent approaches that are emerging from AI-enabled firms.

The new role of researchers

Since the dawn of market research, there has been one and only one way to build scale: through labor. Even in the digital age, the largest research firms have been those with the ability to muster battalions of researchers to design, run and interpret research. There was hope that insights platforms might change this. Yet while upstart firms have built competent, user-friendly, more labor-efficient platforms to execute research, they essentially transferred the labor problem to the client.

Advances in AI are now eliminating large labor pools as a necessary factor for scale in a way that even non-AI-based automation and DIY platforms could not, including those that previously required extensive human oversight. Today, there are already viable companies commercializing AI products that span the entire research process: interpreting clients' business questions; creating a research brief; designing the research; fielding the research; processing the data; and reporting and interpreting both quantitative and qualitative findings

This means that AI can now effectively replace a full research and operations team, operating at a scale previously unattainable with human labor alone. This evolution from labor-intensive projects to AI-driven products



marks a pivotal transformation in the industry. First-movers and disruptors who are not starting from scratch but are instead leveraging AI throughout the entire workflow have a significant advantage. These firms are positioned to take market share by integrating AI comprehensively, rather than using it for specific elements only, which ensures long-term success.

Critical elements of an AI product

Creating a proficient AI system involves a blend of technology, data and human expertise. Here's a detailed look at the three critical elements, ranked in increasing order of importance:

Algorithms are the heart of AI's decision-making. This is the set of mathematical instructions that dictates how the AI processes information and makes decisions. The quality of an algorithm is crucial, as it affects the system's predictive power and efficiency. Though foundational algorithms are widely available and relatively straightforward to implement, optimizing them for specific tasks can significantly enhance performance.

Data is the fuel for AI. AI systems require data to learn and refine their abilities. The volume, variety and veracity of this data plays a pivotal role in the training process. High-quality, well-annotated data enables the AI to develop more accurate and reliable outputs. Conversely, poor data quality can lead to flawed or biased decision-making.

Domain experience is the "soul" of the machine, guiding the development and optimization of AI. Domain knowledge is the most vital component, for it ensures that the AI not only performs its tasks competently but does so in a way that is contextually relevant and strategically aligned with specific industry standards and needs. Domain experts define what "good" looks like, help prioritize actions and ensure that the AI system adheres to relevant norms and values of the field within which it operates.

There are viable insight companies today – whose capabilities are improving rapidly – who are using researchers in new ways. In these companies, researchers are working not on projects but on products. They are channeling

their domain expertise into the development of the intelligence in a way that will create heretofore unimaginable scale.

Think about it: What we see in large language models today is astonishing. Those who utilize ChatGPT for serious endeavors quickly realize its dual nature: exceptional in general applications yet limited in specialized fields due to its training on broad datasets not tailored for niche expertise. ChatGPT operates by predicting the next word that best fits the context of the prompt given, a process that showcases its robust general-knowledge capabilities. For use cases like ideation and copyediting, ChatGPT (especially the GPT-4 model) can produce some truly interesting and even unexpected insight. However, this approach also reveals its limitations, particularly its struggle with specialized knowledge domains, demonstrating that its expertise, while broad, lacks depth.

Of course, the other thing any serious user will know about ChatGPT is that it is far from perfect. It can be waylaid by any number of biases. Out of the box (that is, without additional structure and guidance), it won't necessarily perform well for highly specialized fields. It hallucinates – if machines can do such things – a term used in AI to describe when a model generates false or irrelevant output based on the gaps or biases in its training data. Occasionally, it will completely flake out. By way of example, older versions are incapable of counting or adding.

This is where domain knowledge becomes critical. Engaging skilled researchers in the development of the intelligence demonstrably improves the outcome – so much so that the quality of even moderately sophisticated research designed, run and interpreted by AI is now indistinguishable from that of an experienced researcher.

The real challenge will be understanding the nuanced way people communicate. Research firms wishing to leverage AI will need to make their own investments in advanced natural language processing techniques to allow for a deeper understanding of consumer sentiment. AI platforms will also need to accommodate multi-modal inputs, be they text, audio, photo or video, to capture communication in its many forms.

These systems are increasingly "good enough" for a wide array of real-world applications, challenging the notion that high-quality research can only be conducted by human experts. Moreover, the pace of improvement in AI technologies suggests that they will become even more competent and indispensable tools, surpassing human capabilities in many areas.

The traditional model of deploying large teams of researchers to manage projects will become obsolete. The future lies in researchers developing products – intelligent, self-operating AI systems that handle the bulk of data analysis

and insight generation. This shift means that a smaller number of highly skilled researchers are now required, primarily to "teach" and refine AI systems. These experts will focus on ensuring the AI operates within the correct contexts and maintains high standards of data interpretation and insight generation.

It also foretells an even greater democratization of insights that makes high-quality research accessible to more organizations, enabling smaller research companies to compete on a more level playing field with larger firms.

Change dramatically

AI insights products spell the end of large labor pools as a prerequisite for scale. As a consequence, the competitive landscape of the market research industry is set to change dramatically. We can classify these changes across four factors:

REVENUE

- Any competent AI firm will be able to challenge incumbent research firms, even for large-scale studies. Automation and APIs will facilitate the operational tasks and fieldwork. AI will make the decisions, guided by a handful of experts whose methodological prowess will enable high-quality studies at scale.
- Firms with recurring work like tracking studies, normed or proprietary measurement work already had a powerful moat: fear of change. With synthetic data, there will be no need to run months of costly parallel testing. This work is now firmly in play.
- AI has the potential to finally make research accessible to the long and un(der)served tail companies that would have had to use DIY (and largely didn't) because no research agency would get out of bed for such minimal revenue. This implies go-to-market (GTM) strategies that will be very different from the traditional approaches, requiring innovative and more client-focused methods.

GO-TO-MARKET

- The fact that challenger firms can realistically compete with research industry incumbents will require them to demonstrate their competence to a world that does not know their brand.
- GTM will become far more marketingand case study-driven – certainly in

- the short term, and certainly for firms pursuing long-tail opportunities as firms provide proof points to both demonstrate their capabilities and educate their clients about what AI research looks like.
- Closing enterprise deals will still require a strong sales team which can not only convince gatekeeping client-side insights teams but can also navigate the legal and data protection issues associated with AI.

MARGINS

• Gross margins should look much healthier in this environment. That said, investment in the development and improvement of the AI will be significant, though capitalizable.

VALUE CREATION

- Consultative know-how: Having people on staff who can join the dots between the client's execution and the research remains important. The client's goal has never been to run a research project.
- Methodology know-how: Having seasoned researchers, technologists and other business experts will be even more important for building highly predictive, highly activatable insights.
- Tech and data: This will be table stakes.
- Sample: While most AI companies will probably not have proprietary sample assets, accessing real people at scale will be critical. The best will figure out how to solve the endemic challenges of a programmatic sampling ecosystem in which companies struggle to tell the real people from the bots.

One of the most likely outcomes we can expect from the pervasive use of AI is a weakening – if not the outright death – of the iron triangle of insights: better, faster, cheaper. AI will indisputably benefit clients through faster delivery of insights, cost reductions due to automation and the ability to address previously unreachable markets due to enhanced scalability – providing the same essential output as a human researcher without compromising quality.

The evolving workforce

As recently as 2022, the industry was still focused on storytelling as an essential skill. ChatGPT learned it like Neo learned

kung fu in "The Matrix." The future workforce has at least several types of people who exist today. Methodology and operational SMEs are still critical to teach the AI what "good" looks like and how research works. Yet rather than working on projects, they will work on products. For large clients, sales engineers will be critical for explaining how things work and engaging with the client's developers on data integrations. Likewise, large enterprise clients will need salespeople and key account managers who can provide expertise and evangelize across the client's organization. Finally, industry experts who understand the client's business problems will always be welcome.

One looming question is what happens when the number of people the industry needs to do work begins to dwindle, and how quickly that happens. There is a potential for significant displacement of researchers and operations people, most especially the armies of offshore workers who, for years, have called the industry home. Firms that can quickly adapt to and adopt AI-driven models will gain substantial advantages. These firms will not only operate more efficiently but also offer faster, more accurate insights at a lower cost, effectively outpacing competitors that cling to traditional human-heavy research models.

At a crossroads

Market research firms stand at a crossroads. The swift advancement of AI presents both significant challenges and substantial opportunities. To compete, firms will need to embrace these changes, deeply integrating AI into their operating models and redefining the roles of their workforce. This transformation, while undoubtedly disruptive, offers unprecedented opportunities to enhance the efficiency and effectiveness of research and expand the market. AI will undoubtedly remain the dominant force for innovation in consumer insights, creating a competitive advantage, especially for those who have invested early. Firms that adapt will benefit from greater analytical precision, reduced operational costs and improved value creation for clients and their shareholders.

JD Deitch is founder and CEO of Passaggio. He can be reached at hello@jddeitch.com.



Professional Resources!

Quirk's serves the marketing research and insight industry with a broad spectrum of free resources. Register online today!

Learning resources

FREE live and on demand video

FREE print and digital magazine

FREE e-newsletter

FREE article archive

FREE market research glossary

Research tools

FREE statistical calculator

FREE industry research report

FREE global directory of research suppliers

FREE industry events calendar

Employment resources

FREE job board

FREE research careers blog

FREE research Careers blog

FREE industry salary data

FREE directory of MR-related degree programs

FREE job and career network groups on LinkedIn





••• health care research

From recollection to reality

Understanding prescribing trends through chart audits

| By Lynn Welsh and Tamara Fraley



Chart audit research enables brands to understand physician prescribing habits in real-world settings, offering a granular view of patient demographics and treatment decisions.

Combining chart audits with other data sources can deliver a comprehensive market understanding.



Capturing real-world data in marketing research can be a powerful tool. When researching physician behavior, this technique extends beyond what can be measured in studies such as ATUs, where physicians report what they think or recall of their prescribing activity, since, whether subconsciously or consciously, when respondents of any type are asked to recall past behaviors there is an inherent risk of inaccuracy. With physicians, they may misremember their activity or portray their prescribing as more cutting-edge than it is, perhaps intuiting that reporting use of newer products on the market may be more interesting to the research sponsor.

With a chart audit study, we instruct physicians to select a sample of their recent patient charts that meet a specific criterion. Physicians are asked to input specific metrics from each chart into our survey platform, excluding any personally identifying information. While this forms the basis of what we are collecting in this research, chart studies can extend further by asking physicians clarifying questions around the chart data to illuminate the rationale behind prescribing decisions. For example, once objective measurements from the chart have been entered, follow-up questions can include: Why was this product selected for this patient? What other alternatives did you consider?

It is primarily for these reasons that chart research has the capacity to deliver timely, real-world prescribing activity combined with the reasons or factors at play in physician decision-making.

Understand the treatment landscape

Chart audit research is a tool for brand teams looking to launch and track their product or drug in the marketplace. Effective product launch and subsequent tracking requires examination of real-world data to accurately understand and evaluate the nuances of the competitive landscape. This can begin pre-launch to understand the treatment landscape prior to a



new product's availability and continue as the product is introduced, begins to see traction and eventually becomes a mature offering.

In addition to collecting actual treatment information (as opposed to treatment recall) chart audits let us attach patient demographics to treatment decisions. This allows brand teams to more clearly understand the specific type of patient (age, gender, comorbidities) for which their product is most often prescribed. Equally as important, teams can see this same information for competitive products as well, providing clarity beyond what can be gained by other sources of data.

Similarly, chart data can map the treatment progression landscape. With real-world chart data, brands can begin to understand what is typically prescribed before and after their product and in what specific patient circumstances. This allows the plotting of treatment progression, layering on varying patient characteristics to understand where patients normally come from in terms of treatment and where drug makers may be losing patients after they have tried their product.

While attaching patient demographics to treatment decisions affords a deeper understanding of prescribing behavior, a properly designed chart audit also allows for profiling at the HCP as well as the patient level. Physician demographics attached to prescribing choices highlight commonalities and differences between prescribers. Such data helps sales teams more effectively connect with physicians based on these nuances.

Further assess market share

With this understanding of the usefulness of adding chart audit research to the toolbox, it is important to examine the marketing utility of this methodology. Specifically, how does chart research help inform decision-making? First, by comparing what is learned from chart auditing, researchers can elaborate on information collected from third-party

data. We can answer questions that might stem from what is learned with secondary data – for example, I can see my product's market share overall but how does this share break out by type of patient? In short, chart data allows brands to further assess their market share by metrics relating to patient type, HCP type or other treatment or disease state indicators.

Second, by shedding light on treatment progression and sequencing, chart audit research can give brand teams a richer understanding of the prescribing habits of physicians. This information can be leveraged to develop messaging that better resonates with prescribers and offers deeper insight into treatment decisions and behavior. By extrapolating patient types, brand teams understand which patient factors most play a role in treatment decisions. Armed with this knowledge, clients can leverage those elements that best drive prescribing in sales and collateral messaging with their physicians. Finally, with the ability to identify and track prescribing trends, chart research can help ensure that marketing tactics are yielding results and can track changes in the competitive landscape, both as new products are introduced to a prescribing environment and older products mature out.

Methodological limitations

The above speaks to the potential of chart research to advance a brand team's understanding of their competitive landscape. However, as with any methodology, chart research has limitations. There are key pitfalls to chart research and while these limitations are inevitable, articulating them at the outset helps to appropriately frame chart audits for clients.

First among the limitations is that physician participation in chart research is limited. Our internal research shows that, among physicians who are amenable to marketing research participation, roughly one-third are open to participating in chart audit research. This smaller respondent pool may result in a discrepancy in metrics that are commonly tracked in other forms of primary research. Thus, to be most effective, chart audit data must be assessed in conjunction



with other data sources. However, what chart audit data may not fully deliver in alignment with other sources, it makes up for in the deeper insight into prescribing behavior that it can provide.

Second, variance in product share data is not uncommon; when comparing market share seen in chart research with that of other sources, there is often a distortion. The reasons behind this are twofold, due to the difference in sample makeup as explained above and the fact that it can be challenging to ensure that the sample, qualification process and data types collected are sufficiently comparable across different study methodologies. This can be accounted for when performing data triangulation or comparison of data across sources.

The final limitation to chart audit research is its inherent selection bias. While physicians are instructed as to what types of charts to pull, it is ultimately their discretion as to what actual charts are inputted. The implication of this is that physicians may not always select charts that accurately represent their typical prescribing behavior. It is our hypothesis that physicians can hold a distorted view of what their "typical" prescribing actually is, or, in some cases, physicians may select charts they feel may be more interesting to the research sponsor or

charts that portray their prescribing in an optimal perspective. While selection bias can be mitigated in our respondent instructions, it cannot be completely avoided. As such, we commonly account for this in the analysis through weighting or other techniques.

A multifaceted look

As with any research study, the elements baked into the chart audit design dictate the analysis that can be gleaned from the data. With deliberate planning, chart audit research delivers a multifaceted look at a prescribing environment, illustrating treatment progression from the perspective of the patient, the physician and the disease or condition characteristics.

First, from the patient perspective, including elements such as gender, age, geography, insurance type, treatment location or comorbidities allows the analysis to highlight key insights as they relate to patient profiles. For example, analysis can be constructed to show the patient profile most associated with a client's brand, as well as that associated with key competitors.

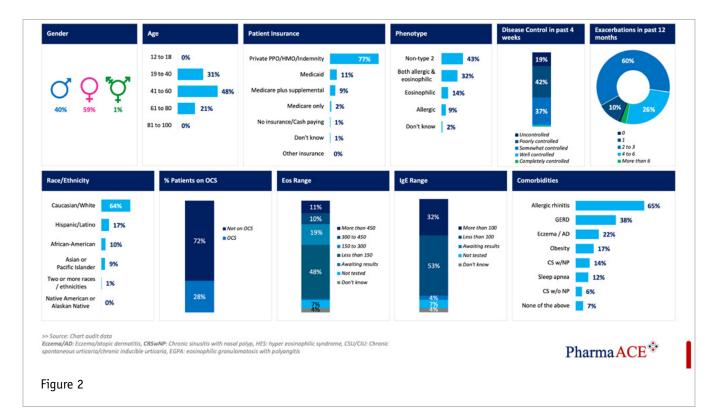
On the physician side, with the correct tactical elements in the chart design, clients can discern the physician characteristics that most embody their prescribers and, equally insightful, those of competitive products. Common physician profile factors include

practice setting, specialty, number of patients with the disease in question, years in practice and even metrics such as testing modality. This is potent information to layer onto analysis and becomes even more insightful as physicians state the reasons behind their prescribing decisions. While probing physician motivations is a common tactic in primary research, it takes on an elevated significance when appending to this information actual patient charts rather than recall captured in ATUs or other similar studies.

The third layer to chart audit design that informs analysis is the specific disease and treatment metrics. By extrapolating from patient chart metrics such as diagnosis date, current treatment status, prior treatments and diagnostic testing results, a comprehensive profile of patients can be constructed.

Chart audit analysis enables brand teams to answer key business questions such as how the brand is performing in terms of market share compared to competitors and what is the physician profile prescribing the brand versus competitors. Figure 1 shows a physician dashboard compiled from chart audit data.

Similarly, the patient profiles (Figure 2) developed illustrate those using a brand versus competitors as well as real-world data to support the patient journey among lines of therapy for the



brand compared against its competition.

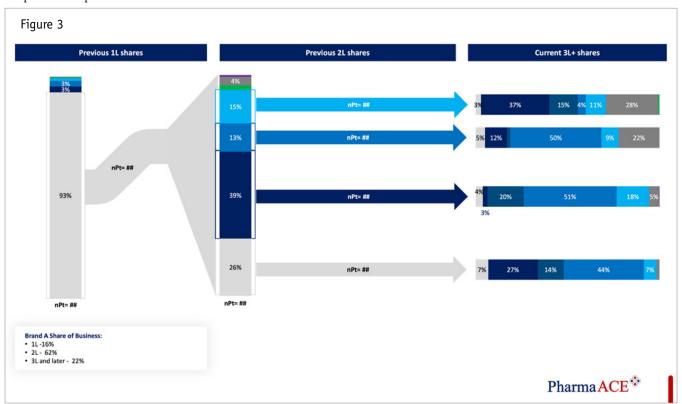
In addition, users of chart audit data can assess: the evolution of treatment algorithms over time; the impact of national treatment guidelines on that algorithm; the reasons for treatment selection, switching and discontinuation; newly launched product adoption and uptake as well as evalua-

tion of target and non-target physician respondents. Figure 3 demonstrates a treatment progression visual common in chart research.

All analysis should be augmented with secondary data to triangulate and supplement brand insights to provide additional value to the brand teams who are most often funding the pri-

mary marketing research and secondary data purchasing.

Chart audit outputs can be a PowerPoint report produced periodically or an online report securely shared with the client and relevant stakeholders. Once the format is finalized, reports can be automated and produced showing new-to-brand prescriptions or claims data to further enhance



the value for teams who desire early insights, leading indicators of new product launches, new indication launches, competitive launches or the impact of new data releases to physician audiences.

A final note on chart audit research is that, to be most effective, chart audits should remain fluid. One way to ensure that chart audits stay relevant to the brand team is to keep an active feedback loop in place. We characterize this loop in its component parts of fielding feedback, analysis review and client subject matter expertise.

On the fielding side, once an initial wave of a chart audit has been completed, the team can assess the recruitment statistics and data quality. It is important to identify any barriers to participation, i.e., where are physicians disqualifying, and determine if adjustments can be made to increase response while still meeting client goals. Similarly, assessing stumbling blocks in the survey that are causing respondents extra time or confusion is a good research practice.

With respect to analysis, as with any recurring or tracking-type research, it is common for clients to add questions or sections as brands evolve and needs change. It is often less of a priority to eliminate questions no longer serving an analytical purpose. It is helpful to ask: Are there questions in the survey that are no longer necessary for analysis?

As brands evolve, key performance metrics may be adjusted as well and culling questions that do not factor into decision points is vital to prevent the research from becoming overly burdensome for respondents and to maintain a high level of engagement with physician respondents.

To ensure timely subject matter expertise, clients play an integral role in the feedback loop as they are privy to information regarding changes to treatment guidelines, new indications or changes to the competitive product mix. Any updates to the treatment landscape must be replicated in the chart to ensure the instrument collects timely and relevant information.

Aligned with segmentation and targeting

In summary, the chart audit can be a valuable and timely market research tool for brand teams to consider as they are launching a new product or indication as well as tracking an existing or competitive product. Chart audits can assist in providing leading insights to brand teams regarding reasons for treatment selection/switch/discontinuation, sequencing of regimens and profiles of both physicians and patients that can be aligned with internal segmentation and targeting. Integrating your market research analysis and recruiting partner in the process of brand team report readouts and third-party data triangulation is essential for success and enhanced insights to maximize chart audit research value.

Lynn Welsh is chief research officer at Olson Research Group. She can be reached at lwelsh@olsonresearchpa.com. Tamara Fraley is client partner at PharmaACE. She can be reached at tamara.fraley@pharmaace.com.



Say goodbye to quality headaches.

dtect is the purpose-built, independent data quality platform designed to address the challenges of poor-quality data in market research.

Our advanced system proactively prevents fraudulent survey participation, saving you time and resources.



Set a new standard with



MARK IN MARKET RESEARCH

Level up your career and boost your resume with our flexible online courses and certificate programs.

· Qualitative Market Research

Communicating Research Results

Measurement and Questionnaire Design

· Sampling in Market Research

Analytics 1–2–3…and more!

Your next career move starts here.



Scan the code to learn more.







••• qualitative research

Less is more

How a measured, respectful approach to interviewing yields more insights

| By Kai K. Fuentes



abstract

During interviews, especially about sensitive or emotional topics, taking time to listen and probing with more than just a series of whys can help clients see life through respondents' eyes.

There's a common saying amongst researchers that we "put 20 pounds of sugar in a 5-pound bag" – that we have this superpower to expand the allotted time of our research to contain every question the client needs to have answered. We always try to fit in more.

After trying to fit in more for many years, I've made an interesting discovery: More questions don't always equal more answers. In fact, in recent years I've had greater success with a less-is-more approach.

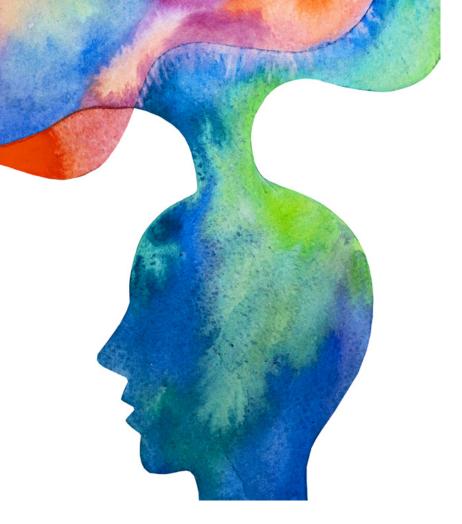
Let's be candid: clients certainly won't request that type of approach but it can work even with large-scale projects. For example, we recently partnered with 1,000 Days, a global organization that seeks to improve nutrition for women and young children throughout the world, to explore current perceptions about the U.S. Centers for Disease Control and Prevention (CDC) dietary and nutrition guidelines for birth parent and child during pregnancy through the end of the second birthday, known as the 1,000-day window. The research objectives were to understand awareness and attitudes towards the CDC recommendations and then share those results with the advocacy community.

The 1,000 Days study covered three cohorts of Black people: pregnant, postpartum who breastfed and postpartum who were not breastfeeding. Breastfeeding is a judgment-laden topic with increased sensitivity in the Black community related to awareness and education.

A sweeping scope, CDC guidelines, three nationwide cohorts and a sensitive topic – there's a lot packed into this project.

Trust established

First, it is important to note that trust had already been established with the client. It enabled a "less is more" project design of four phases of nine in-depth interviews (IDIs) nationwide – three mothers from each segment per phase. Time was built into the design so that each phase could inform



the next phase – this "each one, teach one" approach succeeded by limiting the number of participants per phase.

Each interview was an extended interview of 90 minutes vs. one hour. This is an example of "more is more" – the participant gives more time but in turn receives more breathing room. The extended time was not an opportunity to add more. Some of you are already doing the math in your head – "I could do 20 questions" – you don't need more than two minutes per question, right? No. This time allowed experimentation with various questions. After the first phase, it became the accommodating carrier of the respondents' lived experiences.

The knowledge gained in the first phase revealed that the discussion guide could be boiled down to four questions to be used in the next three phases:

- I. How did you find out you're pregnant? This first question kicked off the storytelling. They proceeded from there, covering many days of the pregnancy and after – often answering planned probes in their own voices without much prompting other than head nods.
- 2. How did you plan to give birth to your baby? The birthing plan turned out to be another floodgate-opening question. This naturally revealed the choice of doctor or midwife, making it organic to probe if the doctor or midwife was a person of color, which became a key insight. This question also naturally draws out the influence of culture, family, social media and other sources of information.
- 3. Talk about your weight, blood pressure, pre-diabetes during the pregnancy. Had a probe ready here about how they found out if there were issues. Also, probed here about "How would you describe your food choices during your pregnancy?" Then it felt very conversational to gently delve into this area further by asking "What's the difference before you were

- pregnant?" Again, the moderator had the handy guide of probes to check-off during the interviews but the flow of the story belonged to the interviewee, allowing for more details that were volunteered vs. probed such as exercise during pregnancy.
- 4. Did you consider breastfeeding your baby? Why or why not? Probes as needed: "What did you understand about benefits/problems for breastfeeding for parent and baby?" "Where did you gain this information?" By this time, we've gained her trust and established that she's talking to someone who will simply listen, not interrupt to get through a lengthy discussion guide of questions.

Notice that the "why" question comes last, deep into the interview after a conversational trust has been established. Researchers are taught you need to ask why. Maybe even five times. Clients seem to especially like being able check off the "why" question box when listening to interviews. But if you look up the five whys, you'll find it's classified as an interrogative technique. Interrogation, not conversation.

Years ago, an interviewee challenged my thinking on asking why. During this interview, I had a client buzzing "ask her why, ask her why" in my earpiece like a mosquito. And I was. The interviewee answered a question and then said "And now you're going to ask me why." Busted. I had set up a predictable question pattern that was yielding predictable answers.

As moderators we need to be less predictable. Ask interviewees to tell us their truths, without anticipating "here comes the why." This predictability is taking both you and your respondent out of the moment. It's now becoming a checklist to get through vs. a respectful place to share their story.

I'm not saying to never ask why. Rather, be mindful about where and when it's used. Questions help people formalize their thoughts, like bullet points in their minds. Those points then become naturally embellished with when, where and why. As respondents in the breastfeeding study answered the question about how they found out they were pregnant, they naturally provided insights into why they became pregnant. Were they trying? Not trying? Were they doing IVF? That "how" question, with its natural evocation of a timeline of events, helped unfold their story. It made it easier for the

respondents to answer and avoided the extreme awkwardness of asking, "Why did you become pregnant?"

Not their voice

One of the goals of research is to have that moment when the end client sees life through the eyes of the respondent, the same feeling you get when reading a compelling book and suddenly find yourself stirring a steaming ground-nut stewpot in an African village. You don't even know what a groundnut is but you're having that experience. Researchers strive for that type of story or rich quote, yet so often when reading the transcript, that great quote you recalled is actually your probe or summation – the respondent agreed but it's not their words. It's not their voice.

As unnatural as it feels, the solve is asking fewer probes, chasing fewer rabbits. In another study, we partnered with the Black Women's Health Imperative (BWHI) to identify proactive strategies that companies can employ to address racism in the workplace, thereby sustaining or improving the overall wellness of Black women. We had completed the quantitative phase of 3,963 online surveys of working Black women and were conducting the qualitative phase of 40 in-depth interviews for the specific purpose of stories that illuminated the quantitative findings.

When I'm designing qualitative that's supposed bring the quantitative findings to life, I take a very critical look at my discussion guide. If that guide, packed with questions and probes, could work as a survey, that's not what I need. My experiences have taught me to keep refining to get to four questions.

I also confirmed, through ongoing discussion with the team at BWHI, that they did not need a "wall of quotes" to re-quantify the findings. Instead, they wanted a deck of voices with three or four quotes for each topic area. So that the insight that wellness is a solitary practice for Black women can be gleaned from hearing "Music feeds my soul. That's how I get through every day. Even in silence, I need to hear rhythm. It could be the sound of the knife on the cutting board." Or feeling a Black woman's workplace invisibility when she says "It was near Christmastime and this white woman brought

little gifts for everyone's desk. There were six of us. I'm the only Black one. She forgot mine." Or wanting job benefits communicated more fully: "The HR person could be more intentional about Black people, like, 'Let me ask if they know about this; there are options to help you.' A Black woman [in my office] just had a baby. The HR person could ask her how she's doing, review options with her so that if she needs any help, she can go there."

Three keys to finding more with less

The BWHI interviews produced touchstone vignettes that lingered. Here are three keys we used:

Listen for when the interviewee is speaking fast – and resist the urge to join in that intensity. When the words are coming out quickly, that's a cue to just listen. People speed up their speech when they are emotional. Hear them and receive that story, that emotion. Their words can become the pivot point of the research report. The slide that you can put up and let the client sink into. The quote or story that becomes what people remember, refer to and use as motivation for action.

Keep that probe in your head for a bit longer. Fewer probes, more patience. The interviewee will get there because it's part of their story. Which gets to less-is-more in the backroom: On sensitive topics, the standard at our firm is only the interview and interviewee are on the IDI. This eliminates the frantic text, Slack or chatroom pestering by the client begging the interviewer to ask the probe. The client can watch a recording later and hear all their questions being answered.

The nine-second pause. Another clue not to probe is when the interviewee goes silent. Be with her in her silence. Nine seconds - pregnant pause; easy to remember: nine = pregnant. This pause is the difference between a game show host and a moderator. If you're a game show host, dead air is bad because viewers will turn the channel. If you're a moderator, silence is the way to show people you're staying with them. To practice this, first become aware of how long you allow for pauses in interviews. Watch your transcripts. Look at the time markers. How close are you to nine seconds? (Longer may be even

better with more introverted interviewees.) Then practice in conversations. Silently count to nine after someone finishes a thought before you chime in. With practice, it becomes habit.

Fewer probes, more grace

One additional benefit of having fewer questions/probes is more interviewee trust. In the 1,000 Days breastfeeding project, one woman broke down in the middle of the IDI. She was crying. A LOT. For a time it seemed like she might not stop. But that's okay, because she obviously needed to get something out and that was one of the project goals. She just kept apologizing. She said, "I just feel so alone and not worthy." She was breaking my heart so I asked if we could just take some deep breaths together. I said, "Right now, in this meeting, you are not alone." The comfort I could offer was to be there.

As the interviewer, you may need that grace for yourself because an interviewee's stories can also affect you. In this instance, the woman was crying about her mom, who was not very supportive. That was triggering to me as it brought back my own memories. Resist the urge to say, "I've been there." That's dangerous even with a friend because people aren't asking you to tell your story; they need someone just to listen. Stay in the interviewer role and be the vessel for their story to be heard.

Moderator self-care

"Less is more" also applies to you, how you care for your moderating self. Here's the "pace of grace" I use, especially on topics that I know will result in highly charged, emotional interviews: only do two interviews a day if they are an hour, one a day if they are 90 minutes. And don't do them back-toback. Now, for consumer research such as talking about lipstick or laundry detergent it's fine to do 12 p.m., 1:15 p.m., etc., as these are not sensitive topics.

For the breastfeeding study, there was one interview in the morning and one in the early afternoon. I purposefully chose those times for me as well as the interviewee. In the morning, I am super fresh and can sufficiently recharge before the early-afternoon session. Or you can do one in the morning and one in the evening. If I do an interview at 10 a.m. then another at 4

p.m., I've lived a whole other lifetime in between. With my husband, my kids, my clients or my team. That helps me to move on from what I heard in the morning interview, so I can come to the second interview with a clear mind. Plan for your buffer.

For the Black Women's Health Imperative, the interviews were divided across three Black women moderators. While 40 conversations are doable for one or two moderators, it was more self-respecting to divide these intense conversations among three. In this manner, our firm was also able to model one of the solutions we heard from the quantitative: Please relieve the one Black woman from having to speak for all, from being the "burden bearer." The full weight of the interviews did not fall on one of us, nor did the responsibility of synthesizing the data. We could check in every Friday night, like a happy hour. We would talk about our experiences doing the interviews. Most of the final report stories were identified in these weekly debriefs. If a story was moving to us, as culturally sensitive moderators, it was going to be moving to those reading the report.

Less judging, more respect

Moderators work hard to show up in a nonjudgmental way. You are going to hear stories that startle you. There are all kinds of things that happen to people. Sometimes it's a card they were dealt. Sometimes it's a card they played. But regardless, they need grace and empathy. This approach has helped for doing research across many topics: people living with HIV/AIDS; people with drug and alcohol addictions; sex workers.

How do I practice this? (Because it does take practice.) Before each interview, I take deep breaths, understanding and retelling myself that this is somebody's mother, brother, sister. This person could be my family member, my neighbor, my best friend. I affirm that I am going to treat this interview with the utmost respect and avoid judgment so that their story is heard. Because their story is important.

To be candid, not reacting in a judging way can be challenging. You don't go into an interview planning to hear triggering things. I've heard racial slurs in interviews. Did the person not notice that I'm Black? Can they not

see who they're talking to? How do I remove myself from that? Again, I take a moment to remind myself it's about empathy and being nonjudgmental. Understanding that even though they are using these terms, or they feel a certain way, that's their story. They still have the right for their story to be heard.

Take the chance

Some clients and topics won't give you the space to try ideas like the ones I've shared but if you're told "We trust you to design this project," take the chance and run with it! Reframe that 40-IDI project from a slog to an opportunity; chunk it into phases, experiment, learn. Keep your approach fresh.

Finally, I'd like to close this article in the same simple way I close interviews, groups, presentation and workshops: I thank you for showing up, for your energy and for your time. 0

Kai Fuentes is the president and founder of Ebony Marketing Systems. She can be reached at kfuentes@ebonymarketing.com.



Article and Video Archive

Search our database of over 8,000 articles and videos related to marketing research and insights.



Topics include

- Case studies Research methodologies Career advice Tips and techniques And more!



Quirks.com/Articles



••• generations research

Late life, not less life

Unlocking the potential of older consumers

| By Bri McIntosh



abstract

Aging isn't always a story of decline. Brands need to rethink how they engage with the vibrant and varied lives of people in their 70s and beyond.

What comes to mind when you think of a person in their 70s? You might see someone with wrinkles and grey hair who is unsteady on their feet and unsure with their words. They are perhaps viewed as someone in the autumn of their lives, with declining capabilities. In some ways, it's a very typical way to think of someone in later life because our cultural and societal reference points do little to refute it. Indeed, we only need to watch daytime TV to see many commercials playing back a very specific picture of older age.

And yet, behind this particular personification of older age lies a massively diverse spectrum of life experiences and lived realities. Unfortunately, these are often overshadowed by the two dominant narratives that shape our perceptions of those aged 65 and over. The first narrative is the romanticized view of older age where (white, heterosexual) couples are often depicted (sometimes in soft focus) gently smiling and enjoying the retired life. The second is the catastrophized view of older age, portraying later life through a narrative of "helplessness" – such as struggling to afford care, being vulnerable to fraud or freezing due to an inability to heat their homes. While these situations do occur, they are only two extremes of the exceptionally varied spectrum of life. With more people in the U.S. and U.K. living to 90 than ever before, we risk underestimating these older audiences and remaining partially sighted to the potential opportunities that these older age groups bring with them.

We recently worked with a leading U.K. financial services provider to get up close and personal with later-lifers to understand what matters to them, where unmet needs exist and how they perceive the world around them. This article focuses on busting some of the persistent stereotypes that exist around this audience and, in doing so, seeks to highlight the commercial opportunities that these large and diverse audiences offer.



Age and the essentialist problem

Before we get into myth-busting, we need to address the problem of age as an "othering" differentiator of human behavior. This isn't to say that it doesn't matter - it clearly plays a key role in lived experiences. However, if we are to take later-lifers seriously, then this age-on-a-page segmentation should be seen more as an influencing, rather than a determining, factor in how we understand these audiences. Essentializing a group of people by a single characteristic removes the nuances, complexities and differences that underpin their lives, thereby removing the potential that exists with them. You wouldn't group together a 10-year-old and 40-year-old in a segmentation, yet "65+" seems fair game for such treatment.

Age beyond the biological

Let's start by looking at how people that fall under the broad spectrum of "later life" see themselves. Herein lies the first stereotype to bust. Someone's biological age does not dictate their perceived age. While "not being the age you feel" risks falling into cliché territory, there is actually more to this when it comes to later-lifers. In our work with the U.K. financial provider, we came across this age "plurality" in various guises and for the purposes of this article we'll focus in on two - those who experience age tension and those who act based on their subjective age. For those experiencing age tension, there is often frustration that their biological bodies are preventing them from living the way they feel. They are sound of mind and years younger in spirit but feel unseen by brands because assumptions and judgements have already been made based on their problems.

"You think we all listen to Frank Sinatra but don't forget our generation gave you Pink Floyd."

Equally, there are those defying their chronological age and continuing the life they always have. For these later-lifers, ages 65 and beyond are markers on a page rather than inhibitors to living the lives they are choosing to live.

"When people stand up for me on the bus or say 'Ahh bless' when they talk to me in supermarkets, I always wonder why they are treating me like an old

Take for instance some of those we met during our research: Geoff who, at 92, is still running half marathons and going to the gym three times a week; Ellen who, at 73, is seen as the tech guru among both her peers and family; or Cath who, at 76, still loves dyeing her hair and experimenting with new fashions.

"I'm 76 and have never felt my age. People are kind enough to tell me that I don't look my age either. I have found that the best thing about aging is, the older I get, the less I care what people think of the way I dress or style my hair (which I dyed shocking pink a while ago)."

Yet, when asked, all felt invisible to the brands they continue to engage with. This may be due to the presumption that brands don't "get anything out of" paying attention to them or that they are "yesterday's news." Regardless, there is a sense that the brand relationship is far from reciprocal. The stories - and the potential opportunities these uncover - are often silenced at the expense of age-based stereotyping.

Second life, not end of life

A further stereotype that continues to linger around perceptions of later life is that, once people leave the labor market at retirement (a term in itself that is becoming increasingly less accurate), they all follow, for want of a better way of phrasing it, a singular downward trajectory. This is situated on the right tail of the productive human bell curve, alongside all the associations this brings, e.g. "settling in," "taking life at a slower pace," "easing up." This

stereotype held little water among the later lifers we spoke to.

The reality is that later life can be just as disruptive or transformative as any other adult age. The non-linear lifestyles that are increasingly common among Gen X, Gen Z or Millennials are becoming a reality for those aged 65 and above. Across our research, we've met couples in their 70s who have sold their home to travel and taken housesitting roles for others to accommodate themselves in their downtime; those who have got divorced and remarried in their supposed twilight years or those that have undertaken an "unretirement" career switch. We've also met others in less fortunate circumstances who are contemplating returning to rental accommodation if they need to sell their homes for later life care, managing the bereavement of their adult children who have passed before them or have themselves become divorced and had to readjust to single life in their later years.

These disruptive life moments, whether positive or negative, bring with them a set of potentially unmet needs. Yet, few feel there was much in the way of viable solutions provided by brands or services that were aimed at "people like them," and in some cases, due to their age-on-a-page, doors were

closed in their face. Let's take Arin as an example. Arin is a keen traveller who recently aged into his 70s. Like many in his age cohort, life has given him some underlying health conditions but ones he feels fully in control of managing. Yet, at the turn of a clock minute, his insurance provider withdrew this benefit from his financial package for no other reason than turning 70.

Positively, a few brands seem to be tuning in to the person, rather than the age of customers. For example, Co-op Insurance is currently running a TV ad that explicitly references age, underlying conditions and risky holiday choices being no barrier to its insurance offer. Product innovations like these are only possible when brands tune in and listen to the person beyond the stereotype. Given that those aged 75+ are predicted to add 2% of U.K. GDP by 2040, the opportunity is clearly there to be embraced.

Order doesn't come with age

The final stereotype to combat is the misconception that with age comes life order. Not all people who enter their later years have their lives in order. As children of those in their later years, we might assume that because these are our parents, that they've got life admin

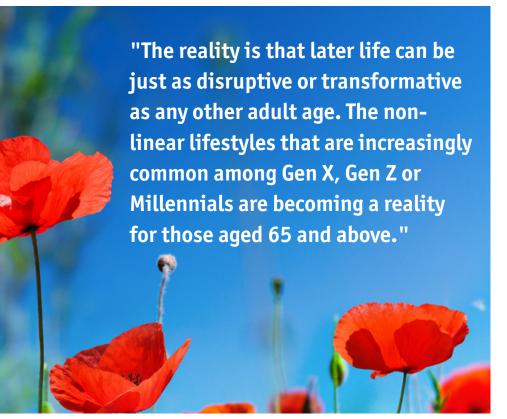
sorted and a plan in place to deal with life when it needs fixing. However, getting closer with those in later life shows that being prepared is far from universal. While most of the later-lifers we speak to say they've got a will in place, beyond this, things become much patchier. Tasks like setting up power of attorney, plans for future care provision or even death administration remain outstanding for many of those we spoke with.

There are various reasons at play here. Don't forget the cognitive dissonance mentioned above. Like the rest of us, many later-lifers are sidelining these duties - when they become more relevant, when they feel older. Some later-lifers see these tasks as being for when they begin to feel older. It becomes a job for tomorrow, an action that can wait until it is triggered by a moment or life event. In these cases, the biological realities of life play second fiddle to the subjective perception of self. In contrast, others have made deliberate choices based on life experiences rather than rational pragmatism. Gerry refuses to get power of attorney (POA) in place because when his partner's mother passed away, the POA outcome pulled apart his family, as he has no desire for that outcome to repeat itself. Mike hasn't done any planning for when he passes because in his words "I won't be here, it's someone else's problem to deal with." Whether Mike genuinely believes this or uses it as a way to avoid acknowledging these financial limitations is up for debate.

Unmet opportunities

The above shouldn't come as a surprise because as humans, we only act when we feel like it. That does not change with age. There is no playbook for later life, which opens up a territory of unmet (or even unknown) opportunities for brands and organizations. Yet until the real stories of later-lifers are listened to, and not dictated by stereotypes, these audiences will continue to be underestimated and a lose-lose situation for all parties. We can, and should be, better when it comes to how we view later life, so let's get on with it. ①

Bri McIntosh is senior director at Human8. He can be reached at bri@wearehuman8. com.



Do you have the ambition to transform your Insight team?

Customer and Market Insight has the potential to transform any organization.

But if we want Insight to transform our companies, we first have totransform our Insight teams.

The IMA is the world's leading authority on transforming corporate Insight teams.

It provides its members with inspiration and guidance through advice, benchmarking, publications, training and the Insight forums.



Read the book

Review capability

Prioritize development

This is the year for



••• special advertising section

10 TOP PHARMA RESEARCH COMPANIES

Conducting pharmaceutical research may be complicated due to the sensitivity of the data and insights collected and the size of the industry. Pharmaceutical research companies can offer you information into things like OTC and prescription drugs and vaccines, medical devices and other pharmaceutical products.

Companies specializing in pharmaceutical research understand the difficulties of working in this sector and utilize a variety of methods to gain insights while remaining in compliance with information privacy regulations. These companies have the resources you need to reach pharmacists, doctors, medical staff and patients with specific health conditions.



Applied Marketing Science (AMS)

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

Applied Marketing Science (AMS) is a Quirk's Marketing Research and Insight Excellence Award-winning full-service market research consulting firm. With roots in MIT Sloan, we have



over 35 years of experience providing high-quality, data-driven insights. Leading organizations trust our expertise because we deliver actionable insights – and we can do the same for your team. We have advised innovators across disease states and clinical specialties in engagements examining the patient experience, referring physician behaviors, market opportunity analysis and brand strength and positioning. Let us help you uncover insights that lead to better patient experiences, more satisfied providers and better financial returns.

Phone 1-781-250-6300 ams-insights.com/who-we-help/medical-products-and-pharmaceuticals



CASA Health Insights

Founded 2005 | 43 employees Dulce Alonso, Ph.D., Insights Director

Standing at the intersection of health care expertise and multicultural immersion. the CASA Health Insights team is uniquely positioned to deliver patient and practitioner



viewpoints to appropriately shape important business decisions for your brand or organization. Our team of multicultural Ph.D.-level health care and pharmacology professionals is uniquely experienced in carrying out insights research among patients, physicians and other medical professionals from specific ethnic backgrounds, such as Hispanics, Asian Americans and African Americans and language backgrounds including Spanish, Mandarin and five other languages. Beyond North America, our highly-trained U.S.-based health care moderators also have experience conducting interviews across the globe. Piggybacking off decades of qualitative health care projects with multicultural audiences, our dedicated practice was formed in order to provide a more science-focused and resource-rich team that fully dedicates itself to the intricacies of the health care space, including innovative pharmaceutical developments, rare patient conditions and complex health policy choices.

Phone 1-888-680-1931 x140 casademographics.com/health-insights

Decision Analyst

Decision Analyst

Founded 1978 | 120 employees Monisha Hatfield, Senior Vice President Bonnie Janzen, President





The Medical Research Group at Decision Analyst specializes in qualitative investigations, strategic survey research, advanced analytics and consulting services for the pharmaceutical, medical, health and wellness industries. Our team of medical research specialists has the experience to solve difficult marketing problems and our scientific and technical backgrounds ensure we understand the complex issues in the medical industry. Much of our work among patients and HCPs is strategic, multiphase and often multicountry. Decision Analyst specializes in strategy research, market segmentation, new product concept testing and forecasting, messaging optimization, innovation services and advertising research. Our researchers will recommend the quantitative or qualitative technique best suited to your research needs. We design and execute marketing research and consulting assignments in North America, Europe, Latin America, Australia, the Middle East and Asia.

Phone 1-817-640-6166 www.decisionanalyst.com/industry/medical



Fieldwork

Founded 1980 | 350+ employees Steve Raebel, President



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

Phone 1-800-863-4353 www.fieldwork.com/market-research-services



Mindspot Research

Founded 2006 | 8 employees Lynnette Leathers, CEO Jeanne Campbell, Managing Director



Mindspot Research is a full-service custom online research consultancy. We are pioneers in online patient engagement and have been meeting people with extra challenges on their terms for two decades. Our team of experienced, caring, professional researchers and moderators are there to help pharmaceutical and health care clients improve patient outcomes and therapies - contributing to a better quality of life and improved activities of daily living. Mindspot creates the opportunity for inclusivity and participation using anonymized online focus groups and accessible surveys. We specialize in patient-centered needs, pre-clinical trial understanding and quantitative assessments. Thoughtful methodologies bring better outcomes.

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



Murray Hill National

Founded 2013 | 35 employees Susan Owens, COO

Clients trust
Murray Hill
National with
thousands of
studies per year
as their research
partner. In return, we deliver
valuable solutions
and high-quality



recruitment and data collection for their consumer, health care, businessto-business and technology projects. Specializing in all methodologies and audiences, we have the ability to host and deliver your results across the U.S. For the last 25 years, the executives at Murray Hill National LLP have worked diligently and advanced to one of the leading data collection and recruitment companies in the U.S. Our teams are committed to meeting your research needs. We provide high-quality recruitment with access to 3.5 million consumers, 500,000+ B2B executives/ professionals, 500,000 physicians, nurses and more, and we organize 100+ patient panels. Our qualitative services extend far beyond the traditional focus group. Our services include online, digital, remote, home use test and any other methodology needing to find an audience with feedback or expert knowledge. Call us today for your next project, your "national" recruiting experts!

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

•••••



Olson Research Group Inc.

Founded 1995 | 55 employees Charles Olson, CEO

Olson Research provides a full spectrum of innovative qualitative and quantitative market research services to the pharmaceutical and life sciences



industries. Our deep access to accurate U.S. provider data combined with our team of senior-level consultants who each possess 20+ years of health care marketing research expertise and our dedicated qualitative and quantitative project managers with an average of 10+ years of experience are hallmarks of our success. We are known for our collaborative approach to research that supports custom solutions and flexible offerings, while staying laser-focused on supporting our clients' most critical strategic decisions.

Phone 1-267-487-5500 www.olsonresearchgroup.com



Qessential Medical Market Research

Founded 1988 | 15 employees Joe Berwanger, President

Recruit targeted health care respondents. Leverage fullservice, qualitative and quantitative research capabilities. Qessential Medical Market Research is



a leading primary marketing research provider dedicated to the pharmaceutical and medical device industries. As one of the most successful recruiting services for health care professionals in the market today, we provide responsive, personal attention for each research project with senior executives leading every assignment in the pharmaceutical, biotechnology and medical device marketplaces. Our expert fullservice health care market research team helps agencies and end-clients answer their essential questions by delivering the business insights needed for strategic and tactical decision-making that make a tangible impact.

E-mail joe@qessential.com Phone 1-603-775-9200 www.qessential.com



TehriHills

Founded 2011 | 45 employees Anne Smith, Vice President

TehriHills is a leading provider of market research and actionable insights, specializing in health care and digital transformation. With a proprietary



database of 3 million professionals, including 1.2 million active experts, we deliver tailored insights with a quick turnaround, seamlessly integrating with your business workflow. We use precise targeting and a mix of qualitative and quantitative research methods to provide comprehensive market understanding through consumer behavior analysis, brand perception studies and product testing. As leaders in in-home usage testing, we offer real-world evaluations of product usage and satisfaction. Our expertise in health care and pharma enables us to tackle unique industry challenges, offering insights for drug development, market access and patient engagement. Managing a global panel of 5 million health care professionals, we drive informed decision-making while delivering cost-effective, data-driven market research solutions.

Phone 1-419-504-1602 www.tehrihills.com



Market Research

WebMD/Medscape Market Research

Founded 1995 | 1,800 employees Audrey Rosen, Vice President, Market Research

Medscape offers you what no other health care market research company can: engaged health care professionals who are regularly accessing Medscape for clinical



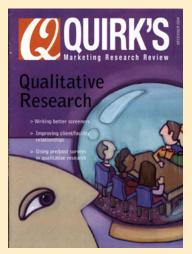
content. Our market research services team leverages these Medscape members to provide you with research solutions that deliver high-quality results. For over 20 years, Medscape Market Research has provided industry-leading recruitment and research solutions for both qualitative and quantitative studies. We use our advanced targeting capabilities leveraging first- and third-party data linked to our broad professional network of highly engaged health providers. This enables us to deliver the respondents and the results that you are looking for. Our members include such titles as MDs, pharmacists, medical directors, residents. NPPAs and nurses. We also offer fullservice programming and reporting. In addition to our U.S. coverage, we are now offering physician sample in the U.K., Germany, Spain and Italy.

Phone 1-646-856-3860 www.MedscapeMarketResearch.com

.....

QUIRK'S TIME CAPSULE

Facts and findings from nearly 40 years of Quirk's



For focus group recruiters, a positive attitude is everything

The 2004 article "Bring a can-do attitude to recruiting out-of-facility focus groups" by Rhoda Schild established that when conducting nontraditional focus groups, it is essential to be positive and forward-thinking. Oftentimes, clients want to conduct focus groups to gather insights from a person's natural reaction or thoughts in various locations. This can be anywhere from an out-of-state sporting event to public transportation. Optimism is key, even in stressful or unique situations. "Never say, 'We don't have those people.' If you do not have them, get them. This is the recruiting business. A good recruiter on a bad day should pull together a reasonable amount of new respondents," said Schild. Maintaining a positive attitude throughout the recruiting process and research

project is of utmost importance. "If you are in the recruiting game this phrase should be at the top of your list: 'If the price is right, we can do anything.'" Along with optimism, Schild

2004

stated that recruiters must be trained for the role and should be encouraged to be quick while maintaining a positive attitude.

How visual ethnography helps uncover consumers' emotions

Visual ethnography often allows researchers to gain deeper insights than traditional focus groups and self-administered surveys. "Visual ethnography observes what consumers do...It doesn't ask them to remember what they have done in the past or predict what they may do in the future, but instead listens to them describe what they are doing right now and why," said Mark Cooper, author of the 2004 Quirk's titled "Why visual ethnography makes sense as a research technique."

Cooper offers insights gathered from research projects conducted using visual ethnography. After researching shopping behaviors among immigrant Hispanic women via shop-alongs, it was found that shopping with family or friends gave them a sense of comfort outside of their homes and a place where they could socialize. "Additionally, they used shopping as a way to learn and stay informed about American culture. Thus, shopping meant much more to immigrant Hispanic women than just making purchases," said Cooper.

In another example, aimed at understanding the motivators of loyalty among frequent museum visitors, ethnographic research revealed that their visits were not driven by exhibits but rather by their view of the museum as a comfortable, familiar place. After analyzing over 150 hours of video, intercept interviews, hidden-camera observation, in-home and in-museum ethnographic interviews and photo journals, the researchers found that frequent visitors used the museum as a place to spend time with friends and family, relax and learn. "The state-of-the-art exhibits serve as a backdrop, albeit an important one, for these other activities," said Cooper.

Then, as now, cash and electronic gadgets top gift lists

o years ago, a C&R Research Services survey found that children were more likely to prefer electronics over toys for Christmas. Money was also preferred by 68% of kids. Children expected to receive the most gifts from their parents, with 33% believing that they would get five to 10 presents from them. Twenty-five percent of children said they pay for gifts with their own money and 59% saved to purchase holiday gifts. Nearly half (48%) said they would ask their parents to donate some of their allocated gift money to charity.



Scan to access all Quirk's back issues.

CALENDAR OF EVENTS

••• can't-miss activities

Quirk's Media will host The Marketing Research and Insight Excellence Awards on **November 19**. Visit www.quirksawards.com.

Corinium Global Intelligence will host CDAO Nordics on **November 19**. Visit https://cdao-nordics.coriniumintelligence.com.

Quirk's Media will host Quirk's Virtual – Data Quality on November 20. Visit https://www.quirks.com/events/quirks-virtual-data-quality-2024.

IQPC will host CX Asia Week on **November 19-22**. Visit www.cxnetwork.com/events-customerexperienceasia.

Media Research Group will host its MRG Annual Conference on November 27 in London. Visit www.mrg.org.uk/events/255.

IQPC will host the CX Healthcare Exchange on December 3-4. Visit www.cxnetwork. com/events-customer-experience-exchange-for-healthcare-usa.

CMO Alliance will host the Chief Marketing Officer Summit London on December 4. Visit https://events.cmoalliance.com/location/london.

Merlien Institute will host MRMW MENA on December 10-11 in Dubai. Visit https://mena.mrmw.net.

NRF will host Retail's Big Show on January 12-14, 2025. Visit https://nrfbigshow.nrf.com.

Insights Association will host the CEO Summit on **January 20-22**, **2025**. Visit www.insightsassociation.org/Events/ Upcoming-Events.

Market Research Society will host AI in MR on January 23, 2025. Visit www.mrs.org. uk/event/conferences/ai-in-mr-2025.

Merlien Institute will host Qual360 on January 29-30, 2025 in Berlin. Visit https://eu.qual360.com.

Informa Connect will host The Media Insights & Engagement Conference on February 3-5, 2025. Visit https://informaconnect.com/media-insights/.

Pharma Market Research Conference will host its conference on February 5-6, 2025. Visit http://pharmamarketresearchconference.com/usa/.

IQPC will host CDO Healthcare Exchange on February 11-12, 2025. Visit www.aidata-analytics.network/events-cdo-healthcare-exchange.

succeet will host succeet 2024/2025 on **February 12-13, 2025**. Visit www.succeet. de/en/events-2024/25/.

Corinium Global Intelligence will host CDAO UK on February 12-13, 2025. Visit https://cdao-uk.coriniumintelligence.com.

Global Insight Conferences will host the Shopper Insights & Behaviors Conference on **February 13, 2025**, in **London**. Visit https://shopperinsightconference.com.

QRCA will host the QRCA Annual Conference on February 11-14, 2025, in Philadelphia. Visit www.qrca.org/general/custom. asp?page=annual-conference.

AMA will host the AMA Winter Academic Conference on February 14-16, 2025. Visit www.ama.org/events/academic/2025-amawinter-academic-conference.

Category Management Association will host CMA|SIMA Conference on February 17-19, 2025. Visit www.catman.global/annual-conference.

Merlien Institute will host UX360 Virtual on February 19-20, 2025. Visit www. virtual.ux360summit.com.

Global Insight Conferences will host Shopper Insights & Behaviours on **February 25**, **2025**, in **London**. Visit https://shopperinsightconference.com.

WBR will host eTail Australia on **February 24-26**, **2025**, in **Sydney**. Visit https://etailaustralia.wbresearch.com/.

Event details as of September 18, 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 com-

plete list of upcoming events visit

www.quirks.com/events.

INDEX OF ADVERTISERS

This issue of Quirk's is made possible by our valued advertisers. Their ongoing support - along with that of the other companies and organizations that market themselves on our Web site, e-newsletter and related outlets - helps us bring you Quirk's and all of its associated resources. When you contact the organizations listed below, let them know you saw their ad in Quirk's!

ascribe	Burke	Market C&C Research
Ascribe	Burke Institutep. 5 www.burkeinstitute.com	C&C Market Research Inc. IBC www.ccmarketresearch.com
CCINVS (A). Canvs	dtect p. 46 dtect.io	fieldwork Fieldwork Inc
IMA Transforming INTA Insight www.insight-management.org	knit goknit.com	MREF Warketing Research Education Foundation MREF

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

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

POSTMASTER:

Please send change of address to Quirk's Marketing Research Review PO. Box 22268, St. Paul, MN 55122. © 2024 Quirk Enterprises Inc. All rights reserved. Quirk's Marketing Research Review is not responsible for claims made in advertisements.

U.S. Postal Service Required by 39 U.S.C 3685 Statement of Ownership, Management and Circulation 1. Title of Publication: Quirk's Marketing Research Review. 2. Publication No.: 0893-7451. 3. Date of Filing: Sept. 10, 2024. 4. Frequency of Issue: Jan./Feb., Mar./Apr., May/June, July/Aug., Sept./Oct., Nov./Dec. 5. No. of Issues Published Annually: 6. 6. Annual Subscription Price: None and \$70.00. 7. Complete Mailing Address of Known Office of Publication: 4662 Slater Road, Eagan, MN 55122-2362. Contact: Steve Quirk. Telephone: 651-379-6200. 8. Complete Mailing Address of the Headquarters of General Business Offices of the Publisher: 4662 Slater Road, Eagan, MN 55122-2362. 9. Full Names and Complete Mailing Address of Publisher, Editor, and Managing Editor. Publisher: Steve Quirk, 4662 Slater Road, Eagan, MN 55122 2362; Editor: Joseph Rydholm, 4662 Slater Road, Eagan, MN 55122-2362. Managing Editor: Not Applicable; 10. Owner: Quirk Enterprises, Inc., 4662 Slater Road, Eagan, MN 55122-2362; Stockholders: John P. Quirk, 6798 Redwood Ave. NW, South Haven, MN 55328, James T. Quirk, 3052 Arden Pl., Woodbury, MN 55129, Daniel M. Quirk, 4662 Slater Rd., Eagan, MN 55122-2362, Stephen R. Quirk, 4662 Slater Rd., Eagan, MN 55122-2362, Ann M. Quirk, 4662 Slater Road, Eagan, MN 55122-2362. Teresa K. Tweed, 16932 Hubbard Trail, Lakeville, MN 55044 11. Known Bondholders, Mortgagees, and Other Security Holders Owning 1 Percent or More of Total Amount of Bonds, Mortgages or Other Securities: None. 12. For Completion by Nonprofit Organizations Authorized to Mail at Special Rates: Not Applicable. 13. Publication Name: Quirk's Marketing Research Review 14. Issue Date for Circulation Data Below: Sept/Oct. 2024. 15. Extent and Nature of Circulation: Average No. Copies Each Issue During Preceding 12 Months: A. Total No. Copies (Net Press Run): 12,12,483, B1. Paid/ Requested Mail Subscriptions Stated on Form 3541: 8,828, B2. Copies Requested by Employers for Distribution to Employees by Name or Position Stated on PS Form 3541: None. B3. Sales Through Dealers and Carriers, Street Vendors, Counter Sales, and Other Paid or Requested Distribution Outside the USPS: None. B4. Requested Copies Distributed by Other Mail Classes Through the USPS: None. C. Total Paid and/or Requested Circulation: 8,828. D. Nonrequested Distribution (By Mail and Outside the Mail). D1. Nonrequested Copies Stated on Form 3541: 3,246. D2. Nonrequested Copies Distributed Through the USPS by Other Classes of Mail: None. D3. Nonrequested Copies Distributed Outside the Mail: None. D4. Nonrequested Copies Distributed Outside the Mail: None. D5. Nonrequested Copies Distributed Outside the Mail: None. D6. Nonrequested Copies Distributed Outside the Mail: None. D7. Nonrequested Copies Distributed Outside the Mail: None. D7. Nonrequested Copies Distributed Outside the Mail: None. D8. Nonrequested Copies D8. Nonrequested C9. N Nonrequested Distribution: 3,246. F. Total Distribution: 12,074. G. Total Copies Not Distributed: 409. H. Total: 12,483. I. Percent Paid and/or Requested Circulation: 73.12% Actual No Copies of Single Issue Published Nearest to Filing Date. A. 12,400; B1. 9,039; B2. None; B3. None; B4. None; C. 9,039; D1. 2,988; D2. None; D3. None; D4. None; E. 2,988; F. 12,027; G. 373: H. 12.400; I. Percent Paid and/or Requested Circulation; 75.16%, I certify that the statements made by me above are correct and complete; Stephen R. Quirk, Publisher.





mrii.org



www.paramountbooks.com



Professional Insights Collaborativep. 3 www.piconline.org

protobrand

Protobrand.....p. 10 protobrand.com

OUIRK'S EVENT

www.thequirksevent.com

Quirk's Media..... pp. 30, 41, 51, 63 www.quirks.com

Quirk's Talent.... quirkstalent.com



Tapestry Research... tapestryresearch.com



Telepoll Market Research.....p. 27 www.telepoll.net

Thinkpiece ㅇ

Thinkpiece.....p. 1 thinkpiece.com

WRITE FOR QUIRK'S



Demonstrate your thought leadership!



BEFORE YOU GO ••• Conversations with

corporate researchers



10 minutes with...

Karen Kraft

Associate Director, Consumer Insights & Analytics, Johnsonville

How did you first become interested in consumer insights?

I was almost born into consumer insights. My mom started bookkeeping for a marketing research firm in Los Angeles when I was six. By age eight I was helping my much older siblings on Saturday mornings by removing golf pencils from the unused movie exit interviews they brought home from late Friday night movie screenings. The scratch paper I colored on was the back of unused questionnaires. Eventually, I started working in the office during the summers in high school and worked my way through college there doing everything from copying and coding to starting to write questionnaires and reports.

When I added anthropology as a second major in college, I laughed when the degree overview sheet listed "marketing research" as a potential career. It was the last thing I saw myself doing for the long haul at that point. However, by the end of college, my desire to help companies develop great products and great advertising overwhelmed my desire for multiple years of grad school. Thus, here I am.

Do you have any tips for small research and insights teams that are working to communicate findings across a large organization? I strongly recommend two things:

First, create a strong network both inside and outside your company. Inside your company, find the stakeholders and allies that value insights. Those folks will help make sure your POV and insights are present at every meeting, especially when you can't clone yourself to be there. Their support will help you entrench the importance of insights throughout the company and help you get additional resources over time. Additionally, befriending insights professionals in other areas – such as product or customer insights – will help make sure you aren't wasting your precious time focused on work that another team might be better suited for.

Outside your company, connect with other insights professionals through groups like the newly formed Professional Insights Collaborative – thanks to Quirk's for making that happen ... yes, a shameless plug - and the Insights Association. Connecting with peers at other companies can help you come up with new ideas for your company, get recognized for the work you're doing that your non-insights coworkers might take for granted and have an outlet to commiserate. I'm part of a monthly virtual coffee with several industry peers that I've met over the last few years that is amazingly helpful from both a professional and personal standpoint.

Second, I highly recommend finding a way to organize your insights and democratize them via a knowledge management platform. Giving your key stakeholders direct access to the insights you already have in house helps everyone keep insights top of mind. It also frees up your small team's time to work on and think about the bigger questions your business is/should be asking.

"...find the stakeholders and allies that value insights. Those folks will help make sure your POV and insights are present at every meeting..."

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



Market C&C Research



TASTE. TOUCH. FEEL. SMELL.

UNMATCHED SENSORY TESTING!

- Eyetracking
- Qualitative Research
- Quantitative Research
- On-site Interviews
- · Hispanic Interviewing

- Project Management
- Programming
- Over 100 mobile interviewing devices
- 33 data collection locations nationwide
- Panel Augmentation



During the month of January 2025, the Marketing Research Education Foundation (MREF) is encouraging researchers around the world to volunteer in their own back yards. Grab your family, colleagues or connect with your fellow researchers and do some good in your community!

Need to know:

- Volunteering at a local level is a good way to truly connect with our communities.
- Serve at your favorite nonprofit. Or, the MREF can connect you with an organization.
- You can host a service group! E-mail alana@mrgivesback.org to get started.

Interested in participating? Visit www.mrgivesback.org/volunteer today!

