



Accelerating Insights

Getting the Most from Qualitative Research

Spring 2019

Why Talk to Customers?

Web and social media analytics generate lots of data but offer little insight on customer motivations and unmet needs.

- People are complex. Big data, web analytics and Net Promoter style satisfaction surveys reveal a lot about what customers do, but provide little insight into why. Talking to customers is vital to understanding *why* they do what they do and how they make choices.
 - How do customers talk about challenges, features and benefits?
 - What is their path to purchase?
 - What are the 'wow' moments in their journey?
 - What makes a brand worth the money?
 - Which information sources do they value most and why?
 - What drives brand decisions?
 - What are the barriers to sale?
 - What is missing -- what problems haven't been solved yet?
 - Why have people stopped buying?



What's Holding Companies Back?

Qualitative Research takes time and can be costly.

- U.S. companies spend more than \$800 million a year on focus groups. In-person interviews and focus groups in particular can be expensive. While online research options save travel and facilities costs, they still require recruiting and analysis which take time and money.

Focus Groups



Individual Interviews



Pop-up Communities



Challenges with Qualitative Research

Finding 'needle in haystack'

- Business decision-makers
- Brand-aware customers
- Low incidence category

Low Value Expenses

- Travel expenses
- Facility expenses

Wasted Time

- Ad hoc recruiting – working from scratch every time

Lack of Representativeness

- Too few customers or prospects
- Lack of geographic representation
- The problem of introverts/bias

Our Approach

We rely on a small, experienced in-house team.

We are seasoned marketers with real world business experience, as well as market researchers, thought leaders and faculty at highly regarded Business Schools. We work as a virtual team and do all the work in-house. This allows us to control every aspect of the work from scoping and design to project management and analysis, and it keeps our overhead lower than most survey research companies.



Our Backgrounds

ILLUMINATIONS
Living by Candlelight

accenture

Leo Burnett

patagonia

BCG

JWT



Prophet

Y&R

Our Faculty Affiliations

BerkeleyHaas



Our Clients

We work with big brands and startups, in B2C and B2B, on a range of business issues.

CarGurus



Angie's list



Jet

VOGUE

Madewell
SINCE 1937

J.Crew

Angie's list

Genentech
A Member of the Roche Group



MCKESSON

GUAVUS



Janssen

Overcoming the Challenges

We offer custom approaches to qualitative research that address clients' business issues.

We are seasoned marketers with real world business experience, as well as market researchers, thought leaders and faculty at UC Berkeley Haas and Notre Dame's business schools. Our approach allows us to control every aspect of our work from scoping and design to project management and analysis and keeps overhead low.



What Makes Us Different

- Experience across a range of B2C and B2C categories
- Able to find low incidence and hard to reach audiences, cost effectively
- Design, conduct and analyze all research in-house
- Manage every aspect of the research process from framing objectives to recommendations
- Select the right sample provider for each project – we are not affiliated with any specific commercial survey panel

Sample Recruiting Solutions

Working with our partners, we access even difficult to find executive, tech and healthcare audiences cost effectively.

- Our relationships with leading sample providers make it possible for us to prescreen target customers. We hand-select participants from among survey respondents based on detailed criteria. Customer databases can also provide an efficient option for qualitative recruiting.

Examples of Recent Hard-to-Find Audiences

Consumers:

- Organic milk purchasers living in the Northwest
- Rabbit/gerbil/hamster owners
- Heavy users of mobile war strategy games
- Regional home improvement store brand-aware prospects

Healthcare Patients:

- Diagnosed pre-diabetic patients not yet on insulin
- Hip/knee replacement surgery patients
- Bariatric surgery patients

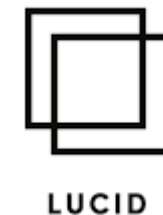
Healthcare Providers:

- Ophthalmologists
- Rheumatologists
- Independent Oncologists
- Psychiatric nurses
- Pharmacy executives
- Hospital CFO's and accounts receivable managers

Business/Tech:

- Frequent business travelers
- Business purchasers of cloud storage platforms
- Big data solution buyers

Our Sample Recruiting Partners

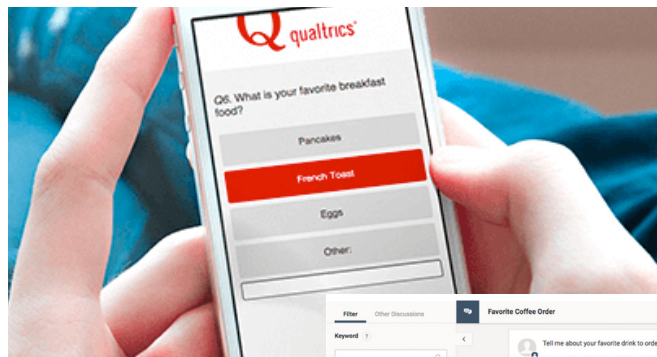


The Right Software Solutions

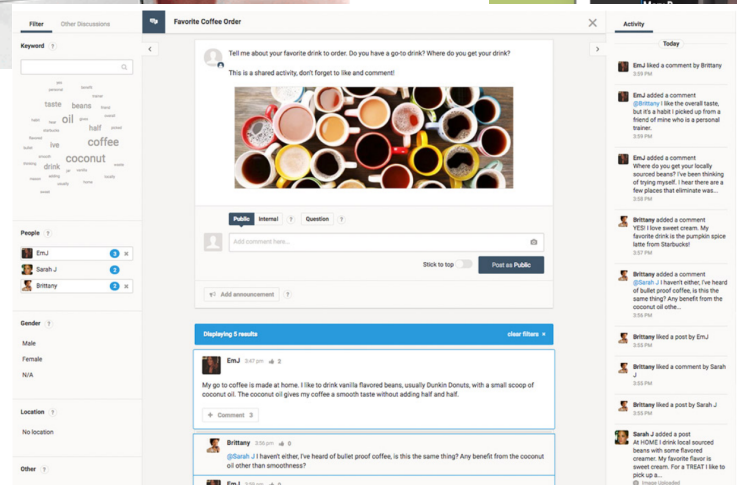
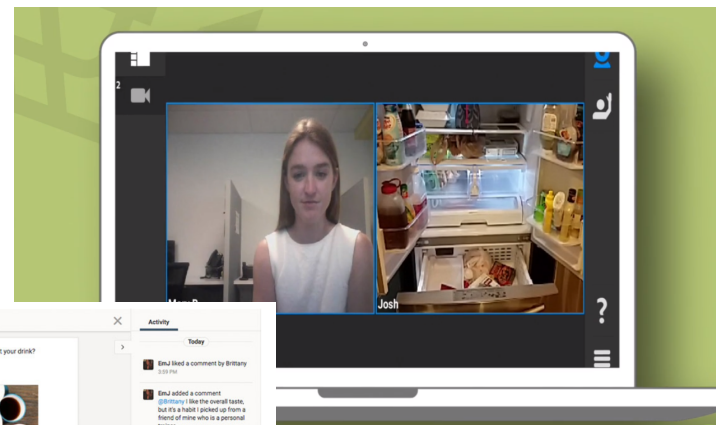
There are many software platforms for qualitative research, the trick is finding the right one for each project.

- Using the right tailor-made research software solutions streamlines the process of conducting online interviews and simplifies access to qualitative interview data for analysis. Easy-to-use software also makes for a positive research experience for participants.

Screening Surveys



Online Interviews



Pop Up Communities

Select Software Partners

 **FOCUSVISION**

20|20

qualtrics


“Dang, can I do this again?!”

“The time went so fast, it was a lot of fun!”

Fast Cycle Time

Qualitative research can be conducted quickly once sample is recruited.

Topline reports and transcripts are often available within hours or days of interviews, with full reports typically available in 2 weeks.



Focus Groups



Individual Interviews



**Pop-Up Communities/
Bulletin Boards**

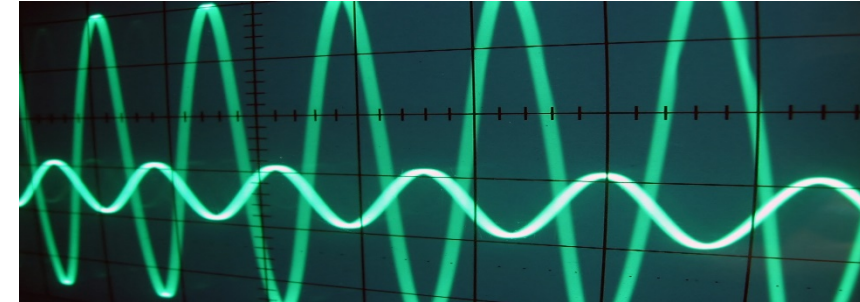
**Project Set up
Time**

	<ul style="list-style-type: none"> • 1 week 	<ul style="list-style-type: none"> • 1 week 	<ul style="list-style-type: none"> • 2 weeks
Time to Deliverables	<ul style="list-style-type: none"> • Full chat transcripts in 1-3 days • Topline in 1-2 days after last group • Full report in 2 weeks 	<ul style="list-style-type: none"> • Interview notes in 3-5 days • Topline in 2-3 days • Full report in 2 weeks 	<ul style="list-style-type: none"> • Real time data • Accessible on demand and stored for up to one year • Topline in 5-7 days • Full report in 2 weeks

Qualitative Interview Options

We emphasize matching the right approach to the type of audience and required insights.

Qualitative research is highly flexible, with some formats more suited to particular audiences and questions.



	Suitable Audiences	Types of Insights
Individual Interviews	<ul style="list-style-type: none"> • Executives • Decision-makers • Healthcare providers 	<ul style="list-style-type: none"> • Partner selection • Decision-making process and drivers • Internal alignment • Segmentation
Focus Groups	<ul style="list-style-type: none"> • Consumers • Patients 	<ul style="list-style-type: none"> • Positioning • Packaging/web design assessment • Competitive perceptions • Innovation
Pop Up Communities/ Bulletin Boards	<ul style="list-style-type: none"> • Consumers • Patients • Executives 	<ul style="list-style-type: none"> • Patient/customer journey • Customer needs • Customer satisfaction and satisfaction drivers • Innovation/new product development

Focus Group Case Study: Cardiac Patients

Cardiac Rehab Curriculum Development (2013)

OBJECTIVES

- Understand the cardiac patient experience and journey
- Assess response to a proposed rehab curriculum among cardiac patients – perceived value, motivation to participate, opportunities for improvement

APPROACH

- Two online groups with 16 patients who recently experienced a cardiac-related event requiring hospitalization

DELIVERABLES

- Topline readout
- Focus group transcripts (audio and in Word)
- PPT report and web-enabled presentation of results, including

ACTIONABILITY/OUTCOME

- Refined approach, moving ahead with project

Patients are often apprehensive about Cardiac Rehab at first.

- Most patients learn about Cardiac Rehab from their doctors. Many patients say they felt emotional, apprehensive and worried when they first learned of Cardiac Rehab.
- Some say they were excited to do something proactive to take charge of their health
- Patients say the purpose of Cardiac Rehab is ‘healing’ - to make the heart stronger through exercise and lifestyle changes.



Moderator: How did you learn about Cardiac Rehabilitation?

Personalization has strong appeal to Patients and PT's.

- Patients especially liked the idea of personalization, personalized feedback and a care plan customized to me. Many also commented positively on the hotline.
- Physical Therapists like the modular set up, as it lets them customize the program to fit each patients' needs and interest level, and helps patients track their progress.

Patients

David K: I like that it's **personalized**. I also like there is customer support. I like the **personalized** exercise supervised by medical professionals, education, and support.

Patricia S: sounds good and like that it would be **for me only** and not just general heart patients

Bibi D: ditto Patricia. I like the **personal ME touch** and the hotline for questions

Patricia S: I like the **personal care** one on one for me

Joel R: care 4 plan sounds good, especially point 4 [real time answers]. customer service is great since its **about me**

Darren G: I think it's a good idea, seems really **personalized** with a way to get feedback

Linda R: If it is **specifically custom** for sake person and their particular ideas it is a step in the right direction

Anthony M: I think it would be wonderful. A more engaging way with **personalized** scheduling

Lynne H: sounds good. Tracking **my progress** would be nice, I could share that with my cardiologist

Physical Therapists (PT's)

Well I like the tracking of the patient's personal progress. Lots of times patients have a hard time **seeing their progress**. Sometimes we make some charts, and I have them document what they do on the days their not there. IT would be cool to show them on something more technological. – Alina R, Virginia

I would wonder about the continued support at home – handouts, etc. That sounds that would be helpful. Login in at home, review things at home, and also track things. Be able to see what they had done. Even giving them homework, possibly be able to see if they had done the homework. I'd be interested in the interactive class presentations. –Kristen D, Pennsylvania

RESPONSE TO CONCEPT



Individual Interview Case Study: Oncologists

Needs-Based Oncologist Segmentation (2016)

OBJECTIVE

- Identify practice-perceived pain points that drive consideration of the client's services and the barriers to consideration
- Discover the most compelling aspects of the current offering and key benefits of membership

APPROACH

- Medical oncologists, radiation oncologists, urologists, and palliative care professional IDIs to generate insights and inform hypotheses about MD segmentation
- Confirm segmentation model and key elements of value proposition, positioning and messaging

DELIVERABLES

- Refined value proposition, positioning, messaging and underlying physician segmentation model
- Detailed customer profiles/personas for each segment
- Suggestions for modifying current marketing communications

ACTIONABILITY/OUTCOME

- New value proposition, positioning, messaging, website
- New templates for pitch decks and collateral

Key Insights: Practice Relationships

- There is a tension between the ideas of 'partnership' and 'independence'. They can co-exist, but have to overcome initial skepticism.
 - Physicians consider their practices to be 'independent' despite their affiliation
 - They fiercely defend the idea that they are 'in control' of their business and

Understanding Motivations

From our research, we have a solid understanding of physician motivations and basis for segmentation.

4 Distinct Motives

Excitement of Innovation	Professional & Personal Fulfillment	Security	Financial Rewards
Being on the leading edge of cancer care	Professionally run practice that's a leader in patient-centered care	Lower cost of practicing medicine at less personal risk	Practice growth and higher reimbursements

Pop Up Community Case Study: Duck Prospects

Retail Path to Purchase Study

OBJECTIVE

- Profile target duck buyers (demographic, attitudinal, needs, behaviors) and their path to purchase
- Understand how to motivate duck purchasers to purchase more often

APPROACH

- Pop-up community focused on shopping and cooking
- Complete exercises / activities designed to reveal insights into purchase drivers and barriers

DELIVERABLES

- Report describing
 - Path to purchase and key influences
 - Challenges and opportunities for enhancing the home experience with preparing duck
 - Opportunities to encourage repeat purchase
 - Insights “platforms” for developing a stronger presence at retail with partners
- Ideation session with client, research participants and retail partners

ACTIONABILITY/OUTCOME

- Leveraged insights to expand distribution of duck at retail

Community members were “excited” about the duck cooking assignment.

The in-store experience did not meet most community members’ expectations

- Most community members went to the store hoping to find fresh duck, and expecting to find it in the fresh meat counter or case, near the other poultry. However, few found any fresh duck anywhere in the store
- Many saw only chicken in the poultry section, and were disappointed by the small selection of duck products

5. #OutofSight-OutofMind

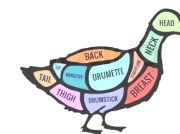
Insight:

The biggest obstacle to converting more Prospects and Occasional Purchasers is its lack of mental and physical availability. Many simply forget about duck when planning meals; others fail to purchase it spontaneously in the supermarket because they don't see it.

- Difficulty finding it is considered a bigger disadvantage of duck than its high cost.
- When told they needed to prepare duck, many consumers worried ‘will I be able to find it?’



CUT OF MEAT DUCK DIAGRAM



Implication: Greater visibility of duck (on cooking shows, in cooking magazines) and greater consistency of presentation in store are important. Consumers need to be reminded that duck is a great choice, see it in store and know they can count on it being available so they can plan meals with duck in mind, as well as buy it spontaneously.

Fees, Expenses and Timing

Fees are quoted separately from software and sample expenses, which are billed at cost with no mark-up.

These costs are fairly typical, though they can vary depending on the complexity of the survey or frequency of waves.



Typical Project Costs and Timing (Excludes Sample Costs)

	Focus Groups (4)	Individual Interviews (25)	Pop Up Community/ Bulletin Board
Professional Services Fees	\$30,000	\$25,000	\$50,000
Software Cost	\$4,000	\$4,000	\$4,000
Sample and Incentives	Based on sample size and incidence		
Weeks to report	6 weeks	3-4 weeks	6-8 weeks

“The refresh has been very well received by retailers and consumers, and we are sharing the learnings and how they drove us to the updates. All good stuff.” – Jane Wasley, Head of Consumer Products, Healthy Pet

Please thank your team for a job well done! The groups were very helpful in understanding the shoppers’ and pros’ preferences and more importantly what they were thinking.” – Mindi Trank, VP Strategy, Chute Gerdeman

Give us a call!

Learn more about our qualitative insights or other offerings.

Brand Audits

- Strategic assessment
- Competitive reviews

Qualitative Research

- Individual interviews
- Focus groups
- Pop-up communities / Bulletin boards

Quantitative Research

- Customer tracking research
- Product concept tests
- Package tests
- Positioning development and validation



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