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Brett Watkins: Well, hello, everybody out there in research land. This is Brett Watkins with L&E Research. I see many of us are logged in here at the one o'clock hour or one o'clock minute, hour, it's combined. So welcome to all of you. Glad you could all join us today. I'm super excited as always. We bring back our returning champions from the future of research between Charlie Rader at Proctor & Gamble and Barry Jennings with Microsoft and our executive producer at GreenBook. And what I like to say, industry muse, Lenny Murphy, along with our very own Kelli Hammock, our research design engineer and client solutions manager depending on the day you asked me. Welcome to all of you. I am super excited, again, to be having this conversation. For those of you who may be having friends and others and colleagues who are out there who could not join us today just a reminder, this is being recorded. It will be shared with everybody on our webinar homepage as well as sent out in links, posts with analysis, as well as transcription from our friends at Focus Forward, our long-time partners there. Thank you, Kim Harrison and your team for as always being our partner there. Kelli Hammock, as I mentioned before, will be the person sharing you her summary of insights of today's discussion. So in case you can't make it we are certainly going to be able to share it all out there with the research world and let everybody catch up. Also, there's a chat function down there, you can chat with us, you can chat with everybody else out there. Feel free to share your LinkedIn profile, share, say hello to everyone. Start the conversation on your own we will be reviewing and doing some question analysis at the end of this discussion, so feel free to put your information down there and Kelly and our friend, Josh, who thank you very much in our IT and technology solutions department will be taking care and helping pull that together and we'll get to those questions here at the end. So to all of you, Barry, Charlie, Lenny, Kelli, welcome again, good to see everybody all healthy and as we were discussing prior to some a hair a little longer, a little shorter now, but all looking good, it's all the same. So thank you for again, as always for joining us, always my favorite time of the year, this is always our most engaged and participatory out there in the research industry's webinar that we have. People are super excited to hear what you all have to say

so as they say welcome and without further ado let's get at it and get rolling. So as always, let's start with technology, how's the industry moving, what's shaking, where are things going anything changed or maybe things can all stay the same. Obviously COVID was a great innovator for people that were maybe quite edge on the technology development solution. Macroeconomic reports say not just insight industry, but everybody was doubling down and making major investments for technology via productivity or new solutions. So what's going on out there, Lenny, you're always a good person to ask on that question. Anything interesting, exciting you're seeing or all the same?

Lenny Murphy: Put me on spot. Thanks, Brett. It's always so interesting in thinking about our industry because there's innovation and there's innovation. So I think the steady state of continual refinement around process, augmentation, all of that continues apace. There's innovation in making things better, are we seeing anything breakthrough? I have not seen anything made me go, holy crap, that changes everything, I have not seen that, but certainly seen a lot of, well, holy crap, now that makes it a lot better, so that makes sense. That is far more efficient or that solves this tactical problem around scalability. The more integration around analyzing structured data, for instance, that's getting better and better across the board and in its scaling and it's showing so that's doing well. There's a lot of innovation happening around sampling. So we haven't quite reached scale with that yet. That continues to be a critical problem of recruiting quality sample, particularly for qual and there's some really cool stuff happening. I think we'll see some pretty significant changes in how we sample over the course of the next year or two, as those things come to fruition and hit scale. As also we should point out that 2021 saw tons of VC money flowing into the industry, and that was all generally to drive growth. That's come to a screeching halt, there's still money flowing, but not as much. And the companies that took all the VC money last year have shifted gears and pivoted towards profitability versus growth. So that means that some of the innovation pipeline has slowed down a little bit because everybody's a little uncertain about what's the next few months of the macroeconomic situation look like. So recognize that and I think what that just means people rather than taking moonshot stuff, they'll continue to keep refining process. That's my take, but Barry and Charlie, everybody's selling to you, they don't sell to me. So what are you guys seeing?

Barry Jennings: I'll start I think you hit something dead on the head. I call it normalization. A lot of the things that we jumped into stuff and I think three plus years ago we had some of these things, but they were side things, they were, oh, if somebody can't quite make the group, we've got a thing that we can use. And it wasn't quite duct tape and bailing wire, but it wasn't great and it was more of

an after the fact type of a thing. And then over the past couple of years things just got better and better in terms of online qual. And I think we hit a point of normalization where it's just a part of our business and how we decide what we do live versus what we do online is clearer. And we struggle in some ways to compel people to show up in person. It has to sort of really, really, really make sense especially now because with a tighter economic condition, it's not a lack of money, but it's more thoughtfulness in how you spend that money. Getting on planes is, I'm not going to meet a customer to close a deal, getting five people to watch some focus groups, I have ways to do that. And it makes sense for me to leverage the technologies and because it's normal it makes sense. And because we figured out small things like, hey, we can go to a conference room and buy a pizza, it's kind of like a back room or you know what, I can DoorDash M&Ms all over the place. And you can still bond in that back room on one of these platforms with a few M&M's in your hands talking about what's going on. And the upside is more diversity, being able to, again, in my world technical B2B technical audiences. So New York, San Francisco, Chicago, Dallas, name the big city, that's where we go, London. Now I can do, geez, I can do Kentucky and I would never go to Kentucky. And it just is not the market, but there are, as our CTO says, there's a lot of really incredibly smart people who do the stuff that we do, who are in the Midwest, who are in the deep south. And now we can focus on the individuals far less so than the geographies and that's huge. So I think that normalization has been the thing that we've leaned into. The innovation, I think you're right as well, nothing's been like, whoa, we took a few bets with some things that were great in improving, and now we know how to use them, the usage of video is just a bet we have better ways of doing it now, but it's just more like, let's use the stuff that's perfected or at least more normalized. And as for sample, well, I hope that's a whole deeper discussion because that's the elephant that we wrestle with, especially in B2B.

Brett Watkins: Well, it's good to point out to the audience for additional information. It's not coincidence that the latest great report that obviously Leia is largely responsible for producing the top two industry buyer need issues were sample and technology. So hence we're going to talk a lot about that here today. And that's a good segue into Charlie. Obviously, a lot of people want to hear what's going on in P&G's world. So that's just one of the forefront leaders on the research and insights industry scope, what have you seen?

Charlie Rader: Hey there. So well, first of all, thanks for having me back this, as an annual event I look forward to because I get to meet up with you guys again and chew the fat on what's going on, I would echo a number of things that both Lenny and Barry had said in the fact that, what COVID has brought about is

refinement of technologies, a normalization of utilizing remote research. So, I remember one of the first things I ever did in online qual was we're using interview by focus vision, and one of these first online focus groups kind of a thing. And the fact is we had a lady from Idaho that was able to come in and join us, and we'd never go there, to Barry's point, the diversity, the ability to reach in lots of different places has always been the key part of doing online research. It's that getting to the real people kind of a thing as opposed to how can we get people into some conference room? So not to take away from facility research, Brett, but sometimes that is part of the limiting factor. And so, on the tech side, I've definitely seen a lot more, I'd say, consolidation that couple of groups are buying a couple other groups and you're like, so what's going to be called this week kind of a thing. And so it has been steady. So, I'd also after the fact that I haven't seen anything earth shattering, we may get to this a little bit later, but video technology and analytics has been a part of my work and research for going on a dozen years. And we had built a video analytics site internally to P&G about a dozen years ago. And it's only now in the last few years that the industry's really caught up to what we really needed. So, it's great that it's available in a couple other places other than the home-built stuff that sometimes you're like, no, is the bailing wire going to hold today, to Barry's point.

Brett Watkins: Without a question, you know what, the word that always strikes me and Lenny, you and I have had this discussion many times is the difference of evolutionary and revolutionary. And so seems like we've seen a lot of evolutionary pieces of technology, but there's been nothing that great. I think there's a lot of the industry seems to also be, would you all agree as catching up a little with and software development a lot of libraries of content come from that people don't realize whether it's Microsoft's library and Google's library or Amazon, all the artificial intelligence, library code base that they have is people are now figuring like, hey, I can access that too. Something I don't think really quite the industry was very knowledgeable about, but is definitely catching up now becoming more prevalent. You all mentioned, obviously sample, you mentioned technology image to tackle into that, needless to say I'm sure most of our audience knows that's been a very hot topic, not just obviously Lenny, you mentioned in the GRIT report, but also case, insights association been highly scrutinized now about sample quality and some problems we had there. I can even speak on our own levels despite having panel that's generally mostly, I devalidate and double opt in and so forth because we're all qualitative. The reality is we started to see like greater influx of fraudulent efforts by people to get in just as COVID came out. So what's the technology side that you see there, Lenny, what do you find?

Lenny Murphy: I'll answer by 1.1 thing that Charlie made me think of just to be fair to you, Brett, not everything is shifted entirely digital it's about fit for purpose. So we always thought that there would be a shift back to in person and there has been, and there's lots of use cases that digital cannot duplicate for in person. If you need to touch it, taste it, smell it, those things, so that's the good news and the data shows that. It's where it was this really lopsided curve towards, in person before 2020, and then really lopsided curve towards digital at the end of 2020, there's some parody there. So it's about roughly 50/50, and all for intense purposes across the board, separated by use case. So anyway, I just wanted to make that point.

Brett Watkins: No, I appreciate that.

Charlie Rader: I'll just chime back in on you here, Lenny, which is absolutely correct. The fact this is where I sit at in P&G on the research and development side and we make stuff and stuff needs to be touched, I mean there's only so much that you can represent on a screen, certainly you got your paper concepts and maybe a demo video or two, but is the diaper soft, how does the Olay cream smell those things, you just can't do without some sort of product interaction. So absolutely right, the choice between remote and in person research has a lot to do with, well, what is really the stimuli that people have to react to so that we can learn to make things better.

Barry Jennings: Plus one on that we make digital products and we can do lots of things digitally and going to a meet up, watching a developer sit with eight other developers, eating pizza and they eat a lot of pizza, and how they exchange information and interact with the thing that we make or the thing that somebody else makes, you can't do that entirely online all the time in every situation. And Lenny, I love your words, fit for purpose. And that's a bigger part of the hard decision making rubric when we think about approaches.

Lenny Murphy: Well until hollow lens, I mean you guys are going to come out to the point where use it hollow lens, there is no difference. We'll have that tactile sensation. Come on, Barry, I know you've got that.

Barry Jennings: I will say it will be different, but it's different in very interesting and unique ways that someone like Charlie will be like, whoa, this is a really cool thing. And at some point, that will have to evolve. Like I don't know how to, I don't want to say every sense can probably be used in some way and some point, are we there on all of those, probably not, but it could be pretty compelling.

Lenny Murphy: You heard it here first. So that's the, oh, crap innovation we're waiting on Barry. Sorry, Brett sample. Sorry, let me, I'm taking this off track, you know it's been a little secret of the industry for a long time. I mean this is not new, we've talked about issues with sample quality forever. I mean P&G back in the day was instrumental in leading the charge in the mid 2000s when online sample was first becoming an issue. I mean the unfortunate reality is that in the world of quant, as we move towards the efficiency of programmatic, and it's just like programmatic advertising and programmatic is designed to go to the lowest point. It's like water, and that just opens itself up for fraud, it just is. It's no different than what happens in advertising with click fraud, so it is an issue. And that's something we have to figure out and it became a big issue for qual as we moved digital because we needed the same speed and efficiency process in qualitative as we had in quantitative. So no wonder it started to impact qualitative panels as well. Excuse me. For me, it comes down to engagement, I think the piece of it is, is that we make it by insisting on anonymity and river sampling and those type of things, as good as those things are, now not please don't torn feather me for going against the ivory tower here, I get it, but we forgot how to engage and engagement doesn't matter to a bot, engagement matters a lot to a human. And I think that's what the stuff that I'm aware of is creating new models to create value for the consumer. They're our customer, when it comes to sample, without them we don't have a business. So we have to think about that. We have to retrain our thinking that Barry and Charlie, I love you, if you're a panel company, you are not their customer, their panelists are, I mean that is their primary constituency. Maybe that's a better way to say, constituency that they have to serve. And so we have to figure out a better way to engage with them. And if we figure out a better way to engage with them by default, we will have a better way to validate them and to engage with them to prove that they're real humans, it's going to cost us more and that's piece of the puzzle too, we've gotten lulled into paying 25 cents for a five minute survey, that's insane, so that's nuts. So we have to bite the bullet and find other ways to decrease costs, but not at sample, we need to pay people real money and we'll get real people and we need to make it a real pleasurable, that's a word you don't hear in a market research, experience for them. And thank God, there are companies that are getting that and are doing good work. Brett, you and I have talked about this a lot, I know L&E, there's cool things in the works that are heading down that direction. So, a lot of people are thinking about this and trying to get there, but it's going to take a little while for the adoption curve to really turn over and move away from the old models. And there's the big guys in the industry, they've built businesses on a very specific model, and it's hard to turn the Titanic, so they'll get there too, but in some cases they're going to have to feel a lot of pain to get there. They're going to have to make shifts in their business model that are not going to please their

shareholders for instance, but it's going to be necessary for long term growth, so we'll see, but I'm hopeful. I'm hopeful that we're moving in the right direction and people are spending some money to make that happen.

Brett Watkins: It's interesting you make this discussion, Lenny because and Barry, you talked about this and everyone's actually addressed this at some level, which was even go back to qualitative, you're talking about sometimes people need to be in the room, there's a better experience, sometimes like, hey, how can I get my people because I can do video and I can just get them in a back room with better video solutions I can give them a pizza and M&Ms there, as opposed to a focus group facility. And so to research to me has always been about connecting researcher with consumer and how do you facilitate that process best? And curious on your end, Barry, when you look at some of this in the sample side of things, what are you seeing from Microsoft's perspective of I'm hearing of issues even where people are finding like fraudulent doctors. Like I thought that was pretty easy to validate that somebody's got a medical degree, you can go to the AMA board and they're going to validate, but we are still hearing of these kinds of issues. And so on your end, I mean when you're talking technology and the actual communications with people and how are you addressing fraud and then how are you all managing and seeing on that?

Barry Jennings: Two words, learning journey. I mean I'm B2B and a lot of people seem to agree with us that it's a bit more of a pervasive problem in our world, our incentives are generally pretty high. And there are multiple things that we try to do. So for example, there are some decisions that we need to make that are significant and make sense for us to invest in premium sample sources, where somebody knows for sure that that doctor is a doctor and that doesn't cost a quarter, it costs a lot. And so we invest in that way, but then we have to also think through the technique that can do that. So I can't do that for a thousand people in a survey. So what is my research technique that I can get away with, I don't know, 150 or 300 on a good day, but sometimes it's far lower. But one thing we do is we invest to get the right person, premium sample is a thing, but it cannot be the vast majority of our work. It's I get fired for spending all that money, finding out the people in the broader sources that we use, again, what do we do from a technique perspective, do we put a MaxDiff sort of dig out the bots and that works. And there are a number of other techniques that are closer to how do we provide that experience that machines just don't do well. And we do that and we're doing more and more research in that area just to figure out how do we get away with it. We are global company and there are some areas where this is a more significant issue than it is with others and we have to go and figure

out how do you get to that. I mean it is amazing to see how the bots and or the humans can adapt to things and how many surveys they do and they start and they fail at, and they just try again and again and again and you have to have systems in place that look at that. And so really understanding where your hotspots are is key understanding, how do you identify is another key, we don't pay for it if it's not good. And that's great on one hand, on the other hand, that just means it's slower. It means that it's an extra step. It means like you always have to look which is frankly inefficient in some ways, but that is what it is. And I'd love to say we had it all figured out, but it is a major issue that our team is actually going to double down on because we got to figure it out. We have other audiences too that are hard, like the developers, for example, we create red herring questions, we give them tests type stuff to, if you are really a developer you know what this means, you know what that means, and when we say double click side hyper, if you say yes to that, you're crazy, because that's crap, that doesn't even exist. And so again, how do we build things in surveys to overcome that stuff? And it's tough and we get closer and closer and closer each time, but right now it's a hostile environment and that means that we are always on our toes, we're always trying to figure it out, we haven't figured it out but we're working hard. And we're doing everything that we know of and we're talking to everybody about it so that we can get better and better and better at it. And we, again, I don't know what the right answer is other than just keep slugging it out.

Charlie Rader: I'll chime in here on the P&G side, we've been wanting to bring to bear a lot of these tools to improve sample quality with the case group, for example, and we are looking at lots of different tools in those things, but just simply kind of a red herring question piece is a great starting place for anyone who's out there, who's like, well, what's a tip for today. Well, be sure, figure out, some pieces that only your user should know about to Barry's point. We are starting to look at, in many cases because we have our businesses and the store shelves are quite expansive with lots of different variants. Sometimes we're asking people to upload a picture and that's the way, upload a picture on their bathroom sink. So I don't want the Amazon picture, I want the fact that this exists in your life kind of a thing and to be able to get to those small incidents users. And so how do we apply technologies in that space, are there new artificial intelligence ways of scanning, looking through pictures, figuring these things out and making that process a lot more useful because having better sample quality is worth paying for, because you're just improving your signal to noise ratio, if I had to have a base size of three to 500 folks, but I already know that to 20% is noise, well, gosh, it would be better to just spend a little bit more extra in screening tools to get down to the real user, rather than figuring out

ways to get the junk out of my data. So, building quality in is really the first part on this side.

Brett Watkins: Charlie, correct me if I'm wrong, but having had this conversation with you and some of your colleagues over at P&G, but there's an awful lot, however, of work being done on your end to "scrub" data, is that right, whether it's utilizing technology companies that are supposedly implementing better data cleansing solutions or to your point, just literally having to take all that data and look at it and say, all right, I'm going to have to clean this up because I know it's got problems already coming out of the shoot.

Charlie Rader: Absolutely. So, we, you know, we have some add ins to our standard stats data package that looks for the straight liners, looks for these, you know, common errors, looks for highest screen, the red herrings have added, you know, even more of an automated basis, that's already built in there. So, well I'm not saying that everything we get is bots and junk, but it's certainly stuff that we recognize that it's not easy to get your true user - that can really answer what you need. And like I said, on the R&D side of life, we're looking at the extreme users in many cases, so that really knowing who we're talking to and getting their responses from is critical and key to making the next decision.

Brett Watkins: Kelli, I know you've been sitting quietly up there. Hello. Needless to say, as somebody who is on the front line working with brands every day and helping them be [AUDIO SKIPS] with those kinds of questions to try to weed out some of those issues up front or the back end, how do we ensure that you get exactly the right people that we're looking for? Tell me what - tell me what you're seeing out there.

Kelli Hammock: So one of the big things I've been seeing this year, and this is kind of a redirect on sample, but it's an increased need of security for panelists. And this I think goes a little bit to what Lenny was saying, is we have to treat our panelists better. So it's actually a positive that we're seeing these vendor assessment forums and making sure the brands are being more cognizant about protecting PII for a panelist. So I think that's one step that's incredibly important, but another thing is - and this again is going to go back to the point Lenny was making, is we have to do better about treating our panelists really well. The incentives have to be there, they have to be good, and we need to, honestly shorten our screeners a little bit, because the number one complaint I hear on the ground floor of recruitment is I take all these surveys, and I never get picked. And what I am - this is a suspicion I have no confirmation, but I suspect that a lot of vendors are using quant panels to recruit their high incidence studies, and

saving their low incidence for the qual recruiting and then what happens here is you sort of burn out the people who are going to fall into those high incidence categories. They are never getting picked to do research, so they do 100 surveys over a year and they're done with our industry, they're done. They don't want to do surveys anymore, because they've done 50 of them and they never qualified. So we need to give them a little more opportunity, we do need to make sure we're balancing. Because to Charlie's point, you definitely want those niche users and they're going to have really valuable insights. But you also probably, and this isn't specific to anyone here, or any brand or agency but we need to mitigate our incidence rate. So a single study shouldn't be all low incidence, It needs to be a nice balance so that we are serving and screening our panelists, they have more of the opportunity to participate, and we need to make it better for them. And I think as an industry, one of the things we have not been so good at doing, that has probably led us down this road is, we have not marketed ourselves, we haven't marketed our industry. Because, I know, I've spoken to a lot of people who said I didn't know what market research was until I started working in it. That that's true for me. I had no idea what this was, until I got a job as a recruiter. So a lot - I think we can do better, about doing what we do for our own industry, so that we're showing people, this is how you can contribute to the brands that you love, this is how you can share your opinions. And by the way, we're going to give you an incentive on top of it, so it makes it a win-win for everyone. And I think, part of the sample issue here, it's half of it is quality and fraudulent panelists, but the other half is supply and demand. So if you start building some safeguards into place to make this a better experience, I think naturally we're going to be able to grow that, and a little pro tip is get them when they're young, that coveted Gen Z audience is what we go at now. We'll let's get them in now, let's make sure to give them lots of research opportunities where they're not just going through screeners and falling out, and then we've got them for life, so we got to start early with them.

Brett Watkins: Kelli brings up a really good point, Charlie, actually for all three of you to answer. And that is a little bit of what's driving the bus right, so when it relates to PII, obviously IT security for those of you out in the audience, specifically Kelli's referring to brands that now whose IT departments demand these voluminous, IT security protocols, that companies must pass and protection to PII is something that even in cases where that's not even being conveyed back and forth. It still doesn't change the fact that the IT department is like well I don't care, I have a process that supersedes, and I can tell you off of personal experience, that the answer has generally evolved into a - OK can we talk more about this, and the lawyers that work for these brands go no, no, no and no, and by no I mean no we're not changing any of

this. No, I don't care if you never touch another PII, in fact, as you still will comply to the standards, if you want to work with us. So the question I have for Barry and for Charlie is when it relates to - you all are having while researchers forget sometimes you will have your own issues to deal with, which is whether it's procurement or IT departments. Their role being passed along to you, that you all don't just get to do it, just because this is the way you want to do it, what's happening on the backside now that we probably really help those researchers out there I understand your world order better what's-

Charlie Rader: I'll jump in there, so you know - I would say that bringing in a new vendor into P&G has always been a bit of an obstacle course I sometimes think of it as a mountain climbing experience, but with GDPR and CCPA and the new privacy regulations that are going on. That journey has become Himalayan in the amount of reviews and governance that is going on there. I mean, when GDPR says you can take and I hope I get this quote right, but 4% of a company's gross sales. Proctor isn't going to mess around and say, Well, you know, we have got to get to a standard, and make sure that things are secured because it's not likely that if somebody wants to sue they're going to go after L&E first Brett, they're going to go after Uncle Proctor. So absolutely, the fact that you know, we as a large brand in the company need to take probably, more than our share of the responsibility in making sure that that our consumer's information is safe. And this is a very much still an evolving space, and it's getting harder and harder. I must say, I often have to remind my privacy and info security people that how do we do research isn't quite the same as, sending out coupons to people. It's a different kind of a process, so they need to understand the research scenario and context, when it comes to privacy and the fact that the value of talking to consumers, doesn't end after 30 days. We get a lot of value from being able to go back and learn from the very expensive research we did in the first place. So, how do we manage that, is definitely a part of what we're doing, the fact that we have internal solutions that we are creating in our own company to manage whenever we have direct PII, if we're exchanging emails or whatnot with a vendor, but even to your point Brett, even if you are considered the data controller, if there is still quite a bit of governance that we're wanting to make sure it's in place, so that if you were to have a data breach, it basically doesn't come back to us. And so that's the kind of the tricky legalities of it, and I would say that the unfortunate result is that our ability to work and try innovation in the market research landscape is stifled. So if folks are coming in to me and saying I got a new solution for you, it better come with an ISO certification these days. That that is almost, if you're coming to me with an ISO 27001 certification there, then you've greased the skids when it comes to tech, but without that, then we have to prove really what is the long term value of this vendor relationship?

Are they doing something that is 2 to 3x what we're getting with our currently vetted vendors, to be able to climb the governance mountain so to speak.

Brett Watkins: Barry, I see you shaking your head in the affirmative, an awful lot over there.

Barry Jennings: I was about to just start saying a lot of amens. I mean, I will say yeah, Charlie, I mean, I tell folks on my team all the time, because you're right, is it 2% or 4% of your revenue? They're not going to after L&E or any research - or pick up huge research. They're not going to go after them, they're going to go after Microsoft. They're going to go after P&G, because 4% of - it's just a bigger number. And so, you're right, the downside is - we've worked really hard to diversify our research supplier set, and it's hard and slow. You know, Himalayan seems true, I say sort of like Navy Seal boot camp hell week, except it lasts a lot longer, and it's hard. Because we are, and every employee here has to take lots of training on this stuff, but we are a data steward, we manage other people's data, because we have cloud services, we are in data user. And, sometimes PII for my team is like nuclear waste, I don't want to touch it. And when I do, we want to control it in many ways, just because we again, have tools and techniques. And to get on the, to get on our docket as a supplier, yeah your ISO 20017 whatever it is, that's a starting spot. And then it evolves from there. And by the way, if you want to do something in Germany, you know stick around, you're going to be writing a little bit longer. And our policy generally is to, is in some ways and I am oversimplifying this, but find the toughest spot, and that's our lowest common denominator, everybody has to meet that. Because we want to make sure that we take PII super seriously is our business, a breach in our system is significant, we have privacy teams, and again we put in the work too. If there's a small supplier, we have a fantastic procurement team, and yes I am saying that. Because it takes work if you're a 10 person shop to figure out navigate, how to work within our system, and it may mean that you can do some things, but you just can't do other things. But that's - there's a policy thing, there's a technology thing, and it's just very, very, very real. And then again there's with us, that the notion the thought of - well maybe we can get but no, no, no, that's a quick way to get a ticket home. Because again, data and customer data is critical, and Brett you said these are, I think the respondents are everybody's customers. And we are all - they are everybody's stakeholder to some degree, and we've got to protect their PII at every point in which we can.

Lenny Murphy: Can I interrupt you for a second, Brett because it occurred to me, and I love what you just said Barry, that you're that you're everybody's customers, thank you, that was a far more elegant way to say what I was trying

to say a few minutes ago. But there's connection here in this whole idea of the confluence of data privacy of efficiency, which Kelly I think you were talking about, and also in fraud mitigation and engagement. I mean, there is a - those who may know me I've been pontificating on this topic for years and I tried to start a whole other company, and anyway we won't get into all that, but what I definitely have learned in looking at other categories, besides the research base - is that there is a way to manage all of these conflicts, seemingly conflicting demands. and the companies that have done it best - I would say, are those platforms that have an individual relationship with the consumer, own - have access to a lot of their data, and leverage that to create a better experience for them, and we see that play out in marketing often. Maybe not perfectly, but that - but they're good examples of how they've taken the management PII and created an engaging experience and is protective of their data, that brings the consumer in to perform some function. Now often that's not - it's not a research function, but in some cases it is, so and I'll tell you who to watch. And that is Walmart and Amazon, so they have both recently launched full bore, full on insights capabilities, built into their platforms, they have lots of data, on lots of people. And they are leveraging that in LinkedIn, LinkedIn is doing the same thing. And they are leveraging those assets now for research by engaging with them in a holistic experience. So they don't have to ask any many screeners because they already know the answer. To Kelli's point, there incenting appropriately because often they have the incentive already in house right, oh you're an Amazon customer, here's Amazon gift card, right. And that that's the inspiration I think we have to get to, that helps solve a lot of these problems, because here's my prediction, you know what happens when Walmart, when Charlie and Barry just start going to Walmart directly. To conduct a research now Barry it may be harder for you, right, in your particular business. But that's where we're heading, because the research industry can't figure out a way to get out of our own way, to try and find this cohesive, integrated solution, but the platform's damn sure are. And if you don't believe me, just look in the news every day, literally. So they are stepping up, because they've solved this problem internally for themselves, and have found a way to monetize that as well, and we need to take that pretty seriously.

Barry Jennings: I think you're on that, and somebody put in LinkedIn is owned by Microsoft. So very true, but I'd like to think of it as - it takes an act of Congress and a lot of prayers to work with them. We have no - ownership does not provide any advantage there, because of that, right, there's a it's just - we also own GitHub, Minecraft, and no - if I could, I'd be a - so we're happy camper, but it's just like no - because of those rules. And again, as a data steward - would I want to be the guy who cost the company like \$8 billion, because of some small

data breach on some survey, no. And it's not in those companies' interest. And you're right Lenny, like the way that an Amazon or a Walmart, and other platforms can digitize things absolutely, it makes a lot of sense their systems are robust. We do things with our own customers, but they're very focused, and it would never be in our - I would never say - hey Charlie we got a bunch of people we can - just never going to happen. And the way that we have to do it is, every I is dotted, every T is crossed, every rule is followed. And there is no variance, because it is that critical and I think those platform companies are smart about that, because they can control all those points. And then the PII itself, it never crosses the line. You get the chart that says you know, women 18 to 24 like the thing to be purple, or green. But you never - the answer goes but the PII just doesn't.

Charlie Rader: Yeah, and I'll echo that, I mean obviously P&G we have lots of good one to one marketing, and people that are - have opted into our websites and whatnot, but for the most part on the research side of things. We don't kind of cross those lines, you know people sign an informed consent is a critical part of that. And they didn't sign up to be part of our research team, and so we - when we approach those kinds of things, those are with great trepidation to blur those lines between research, marketing, sales, all those kinds of things. Because consumers - they wanted to know more about us, so they wanted to hopefully get a coupon or something like that. And it's important for us to fulfill that part of the promise, frankly, you know - it's we're relying on folks like L&E, in our other agency partners to find good people, because it's certainly easier to manage by kind of almost going outside of our system to find those folks rather than digging in.

Barry Jennings: And you know - and my team gets to generate a whole lot of work because of those rules sometimes. An easy path would be to dig into the data, and goes but you can't do that, and there's so many controls, and things that you have to do and not everybody, not everybody knows that we're touching an elephant. Some people - many of us just know what part of the thing that we're touching, and research is the pathway, hey, let's go figure it out - and we could do certain things with our customers, and we have lots of them. But my charge is the broader market. I need to understand people who aren't buying my thing. And that's why we work with the research community because that is our strategic advantage for our team. And, we have to represent that way, and again - could somebody potentially pull all those pieces together in the company, they're about 97 pay grades above me. And they have their own set of rules for everything that they had access and touch, and they get the touch, and it's just - it's way, way harder than probably anybody could imagine.

Brett Watkins: Yeah it reminds me a little bit of most things, that when people like used the words, we or they not really recognizing that there's a lot of they and we. So I mean - I can think to like my own banking experiences, to where I'll skip the bank but had a bad experience and not realizing that even though the bigger banks should not behave that way, the individual that I was working with was rewarded by me doing the way that they did. So there's a lot of - there's a lot of moving parts to that, just like so many conversational topics in society. We are down to our last few minutes, and those of you out here in our audience, if you have any questions or otherwise we'll take these last few minutes to do so. The only question I currently see up here right now which is in our chat function is also an open question area that you can go well. But for on the question side - to all of you, Barry probably a good one to start with you. We talked before about how do we make this experience better for the user right, so we say consumer, that's obvious - sometimes is a lose ubiquitous term, but for the customer itself, right. So, whoever asked the question, how do we shorten screens when we have such niche B2B audiences? So that was obviously one mention away, of how do we make this a better experience, but how do we reduce the questions, obviously her questions is? Well, how do we do that when we need to get so much information to make sure we got the right person?

Barry Jennings: Yeah, our number one way of doing that is using premium sample where they help get 80% of that screening for us. And again, it's not a quarter that's more like 25 bucks, and for certain pieces of research, we pay the 25 bucks, because the data is that important for us, and for the others, we can do the red herring, we can do the other stuff. There's just some built in struct infrastructure with that. And then we had to wrap our heads around that, that's a part of the process. I'm going to have to throw up 20% of the sample, and we have to live in imperfection and just find other ways to make sure that - and like Charlie said it's a part of the process, how do we optimize it within our span of control, right, things will never be perfect, and so we don't strive for perfection, we strive for excellence. And we just try to put together the best product, understanding its flaws, its biases, etc. And we just march on it. That's pretty much all we can do.

Brett Watkins: Yeah, to answer that question, well, even more. Sarah for out there, Barry's referring to sample sources that are not only just asking the ask environment, but are also taking in data on behavioral environments. So, observing what people are doing and getting from those data sources, allows you to triangulate. You can pick those sources, and there are companies where

you're starting to know some of those conversations and efforts as well. That being said, to Barry's point, it don't come cheap. You've got to work with companies, and they don't share their data for free. And so as we begin to overlap those things, and try to triangulate on the data sources, in the end, it just costs more money. And on the consumer front, I'm sure Kelly be happy to speak more on this, if you have any questions on it. But our clients, now, who give us 30 to 40 questions, while we are trying to get them to reduce that always, a big part of what we do now is we break it down into data chunks. And so it's rare that you get asked a screen a 140 questions anymore, it's more like five to 10 questions, and then if you pass the 5 to 10 questions, then you get asked another five to 10 questions, and it's a process. It's a laborious process and that's why obviously this process isn't easy, it's also why as Kelly mentioned, our number one complaint is we get asked a lot of questions. And we never get anywhere, we don't get anything. But that's constantly, we have a wonderful woman in our department whose primary job is - I think her name is Cheryl Gill, of doing nothing but keeping people happy out in consumer land for our - on behalf of our clients. Because our panel gets upset about a lot of stuff, and they don't understand our industry, and she's just doing nothing, but trying to keep them happy. And to include, we even have what we call a need to study list, which is the people that get really upset to try to make them happy by keeping them on a shortlist, of like OK when we get something really easy, that we know a lot of people will qualify for it. We'll re-introduce them back to that, just so that we can then make them aware that you know what - research really does work, they really did care about your opinion. No we weren't just taking a lot of your information and trying to re-sell to somebody else, it was a really legitimate process.

Charlie Rader: Hey, Brad, I just saw something come through chat, which is we didn't - we didn't. We touched very much on the quant side of things, and rather than the qual side of things, where we typically live on this, this particular call. And maybe I'll just make a comment to that, which is video technologies allowing us to touch consumers more. In this space in lots of different ways, whether that's Microsoft Teams or other sorts of solutions platforms out there, bring that quality to the forefront. What's great about this versus the whole quant side of it, is that when you're dealing with qual you get video there, you get a real person. There's not a bot on the other side of the web camera so to speak, and being able to do those kinds of articulation checks with these platforms, is really bringing greater data quality into the qual side as opposed to OK I'm going to - here's one the session was set up, and I'm going to arrive at one o'clock, and let's see who shows up around the table. Oh, well, that wasn't a good one, so the ability of having technology and doing, whether that's some sort of pre-

homework check or take a picture and put it in there. Those things provide greater data quality on the qual side, so just shooting that in there.

Lenny Murphy: But also on a quant right, we have quality, quant approaches, where we can combine those and get the best of both worlds. And I think that we'll increasingly go that way Charlie, because the technology allows us to scale the analysis, just we can ask more verbiage, we can get more videos, we can do that within the combination of a survey, and even kind of an asynchronous or synchronous type of model. And those lines get blurred, I think that will go far. That will always is engagement for consumers, and it will reward them better on the front end, because it will be a different type of experience. So I think that shift will help this overall issue that we're talking about in a lot of ways.

Barry Jennings: And I think that's the future of that where - Oh I'm sorry, I think that's the future of that that we are - we fantasize about that little bit. What's that thing that's not a survey and not a focus group, that people want to engage in and share, that we trust - that they enjoy right. And we can afford and they want to do, and I don't know what that thing is. And I'm sure at some point, if there's a, there'll be a beautiful, beautiful version of Instagram, Facebook, Tik Tok.

Lenny Murphy: Right for research.

Barry Jennings: Altogether for research, but, until that day comes, these are the tools that we have and we can pull through. But, that's the fantasy that we think about sometimes, and I don't know how to get there either.

Charlie Rader: Yes, hey if I can squeeze in one more thing, Amy has another thing about video and being PII. PII is everywhere, unless you are doing extraordinary things to anonymize and encrypt your quant data, if you have a panelist number, that is considered PII, pseudonymous data is PII. And so, it's a fact of life that we just have to manage better and more importantly, I know Barry talked about it being nuclear waste, but you can't be afraid of it as a researcher, you have to realize you're going to have to deal with it, you're going to have to manage it appropriately. But then realize once we have the informed consent, let's go and make the most of it.

Barry Jennings: Totally agree, you got to manage it for sure, and you're right, the small pieces that you don't think about, the wrong person, connect that to one or two things, and if it's mishandled you have a breach, you have a problem. And we don't now - I use that nuclear waste all the time only because my team is like,

you got to suit up and you got to deal with it, you can't ignore it, you can't mistreat it. You have to you have to do the right things to live with it.

Lenny Murphy: This patient Barry in a hazmat suit with tongs, with sample panel like with data now.

Brett Watkins: Well, as the wrap up here, I will also say, give a shout out you know with companies, and I know we're struggling with obviously this PII issue, as it related to you said Charlie the video, once you reply to it, but give a shout out also, insights association is working hard on the lobbyist level. As we start to look at federal regulatory, and they're trying to cobble together, and states are passing around California, Virginia. They're all starting to get hit their own levels, insights association is working very hard to in fact, try to at least put some representation there to say hey - you all have a lot of things to think about and here's some things you really need to think about that's completely you know, that you probably aren't the congressional legislative are not thinking about. But you really don't understand the impacts not just on our business, but overall society that you're going to have if don't try to put some better, some better frameworks around this. So always love to get Melli port, right, the big props she's done a fantastic job over the insights association, so.

Lenny Murphy: She has yes.

Brett Watkins: So, well, I have also, I've kept you now all over three minutes over. And I want to thank all of you again, it's my favorite time in the research industry every year. I'm so thankful that you all get to come back, and have this conversation with us. Share this with the audience to everybody out there, if there was questions we didn't get to, please feel free to submit them. We'll be happy to provide answers to that. As I mentioned to everybody before, Kelly will be providing a summary as well as sharing this out to all of our audience who registered. We'll include transcriptions, which again, I want to thank Focus Forward in their efforts to do that for us as gratis, as part of this process, so again, Barry, Charlie, Lenny, Kelli, thank you so much, enjoyed it as always, great discussion, and hope that you all will come back and do it again for us next year.

Lenny Murphy: Well of course. It's a tradition, so.

Charlie Rader: Now. It is now.

Lenny Murphy: It is, so yeah, if there's a question. Come on, so.

Charlie Rader: See you next September.

Brett Watkins: Yeah. All right, everybody. Thanks, thank you. Bye.