QUIRK'S

For marketing research and insights professionals

If it looks too good to be true...

AI-FABRICATED STUDIES

A wake-up call for B2B research integrity

FOCUS ON THE RESEARCH.

#facetofacemrx

fieldWORK

Global Field Management
Local Recruiting
Online Research

WE'LL DO THE REST.

The End of Traditional Research

Say goodbye to slow, disconnected and outdated methods.
Say hello to the world's most **sophisticated digital researcher**.

> Can you elaborate why the ads don't appeal to you. How would you suggest to make them more interesting to you personally?
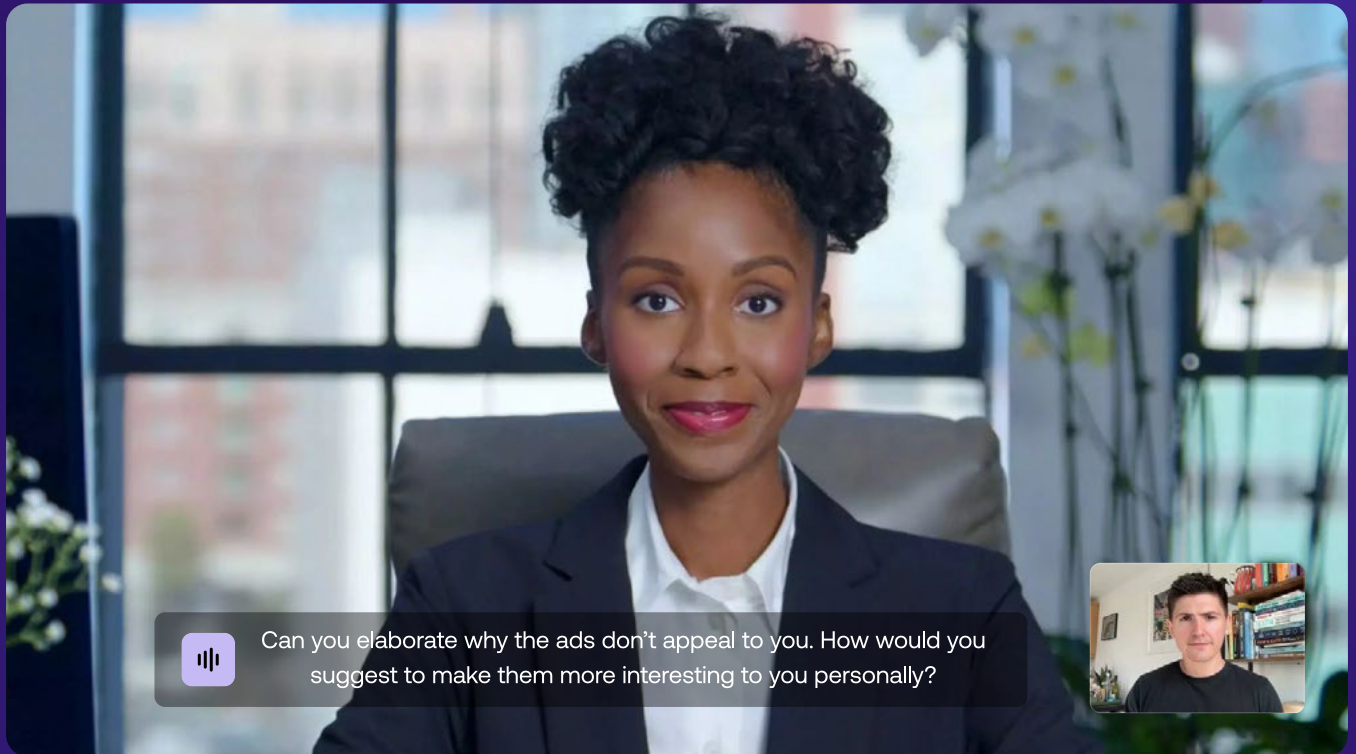
End-to-end qualitative research at scale.

From question to answers in just 24 hours.

Quality insights from real people. No synthetic data.

Not software, but high-quality work done for you.

They get it.

COTY SINCE 1904   MARS   ★HEINEKEN   Coca-Cola   Nestlé   L'ORÉAL

adidas   CP COLGATE-PALMOLIVE   Unilever   Pernod Ricard   M

GetWhy

Proud Legacy Sponsor of The Quirk's Events

GetWhy.io

toluna

Think forward.

It's easy to make today's decisions when you have tomorrow's insights.

Are daily constraints leaving you feeling stressed and uncertain about delivering value to your brand and stakeholders?

Toluna is here to transform your journey as a consumer research and insights professional. Our holistic insights approach combines agility, flexibility, cutting-edge technology, and expert consultation to empower you with dynamic guidance, ensuring confident decision-making even in challenging times.

By harnessing the power of MetrixLab and GutCheck, Toluna now delivers interconnected capabilities, flexible service models, and first-rate expertise, making us your trusted partner for driving greater business impact.

Start knowing.

Find out more at **Stand 111!**

SILVER SPONSOR OF QUIRKS LONDON

toluna

Website: tolunacorporate.com

With Voxco you can
Answer Anything

Voxco is how anyone with even the most complex research questions gets better answers, faster.

Multi-Modal Survey Platform
Powerful all-in-one platform that can flex to fit any need.

Ascribe Text Analytics
With new AI-powered innovations that make open end analysis easy.

Outstanding Service
Range of professional services devoted to helping you succeed.

With the right tools and an expert partner in your corner, you can answer anything. That's why 75% of the top 50 market research firms and global brands in 40+ countries rely on Voxco.

voxco.com

Request a discovery call today!

VOXCO

CONTENTS

●●● Write for Quirk's

Quirk's is looking for interesting, objective articles on all aspects of marketing research and insights.

CONTENTS

COLUMNS

DEPARTMENTS

••• 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.

|C·A·M|B·R|I|

AI powered insights for more successful product launches

Carlsberg®

ŌURA

Coca-Cola

Nestlé

Electrolux

ANORA

DANONE

Cloetta

Valio

BURGER KING

CLICK WITH QUIRK'S ••• online, e-newsletter and blog highlights

Help showcase research excellence

The Marketing Research and Insight Excellence Awards are now accepting nominations! Since 2019, these awards have put a much-deserved spotlight on the researchers, suppliers and products and services that are adding value and impact to marketing research. Nominate today at **QuirksAwards.com**! You can't win if you don't enter.

Quirk's Virtual Sessions: Your go-to for best practices and tools

There are two more Quirk's Virtual Session series this year! On June 11, join fellow researchers for everything DIY Research. This series will give attendees practical tools and strategies to conduct high-quality research in house. Then on September 25, come back for a series on data quality. Learn best practices to ensure accurate insights and help prevent fraud. Learn more about Quirk's Virtual Sessions at **Quirks.com/events**.

// E-newsworthy

- **Reimagining food at home for today's shopper**

- **Maximizing ad impact with insights from DirecTV, Warner Bros. Discovery and vendor side**

- **Work and Play: Monthly column writing and pantry-building**

- **Winning the inheritance race: Using segmentation to navigate the great wealth transfer**

- **Embrace AI to amplify research impact and influence business leaders**

Scan to access all e-newsletter articles.

// Noted Posts

Quirk's Blog

Leading with insight: Mentorship and the future of marketing research
https://bit.ly/3QE97pH

Inclusive approach to transport safety: How one agency was able to make an impact on the safety of autonomous vehicles
https://bit.ly/3QSJUbz

Gauging global perceptions of technology and AI-generated content
https://bit.ly/3X25L4z

Research Industry Voices

The future of synthetic data is multicultural
https://bit.ly/43bNsN7

The real cost of scaling back DEI: How consumers are adjusting their purchasing behaviors
https://bit.ly/3F2xJWE

How to use digital ethnography as a marketing research tool
https://bit.ly/4iftNAu

Research Careers Blog

How to improve employee retention
https://bit.ly/41uHzJW

6 issues challenging Gen Z career advancement
https://bit.ly/4gVzyCm

How organizations can fight employee burnout
https://bit.ly/41aN4fn

emotional logic

Dive Deeper

Uncover unconscious drivers

Change consumer behaviour

Outperform your sector

The power to outperform your sector lies in what consumers are not telling you. Emotional Logic uses award-winning, best-in-class technology to uncover deeper insights into consumer behaviour.

Put the power of Behavioural Science into your insights programme and see the results for yourself.

www.emotional-logic.com

••• shopper insights

A delivery delay's OK if the company pays

Online shoppers are more willing to accept slower delivery if the retailers agree to donate to a charitable cause – but not if the products are utilitarian rather than more of an impulse purchase.

A series of studies with more than 2,000 participants found that consumers were more likely to opt for the slow delivery option if the company made a $1 donation to a charity rather than giving them a financial reward such as a discount on their purchase. This was true across demographic groups, regardless of gender, income level and so on.

But the donation incentive did not improve people's willingness to accept a delayed delivery if the items were mundane or everyday. "For example, if someone needed batteries, the donation incentive did not outperform the discount incentive," says Stefanie Robinson, associate professor of marketing in North Carolina State University's Poole College of Management and a co-author of "Not-so-speedy delivery: Should retailers use discounts or donations to incentivize consumers to choose delayed delivery?," which was published in the Journal of Retailing.

"People's willingness to accept the discount option – rather than the donation incentive – went up considerably if the retailer also explained why they wanted consumers to select a delayed delivery," Robinson says. "For example, if a retailer said the delayed delivery option reduced the environmental effects, people were just as willing to accept the delay with the discount incentive as they were to accept the delay with the donation incentive."

••• consumer psychology

Can a little ribbing make consumers like your brand?

In a paper published in the Journal of Consumer Research, professor Gavan Fitzsimons of Duke University's Fuqua School of Business, with Fuqua Ph.D. student Demi Oba and Holly S. Howe of HEC Montréal, found that the use of "playful provocation" increases brand connection, by making brands more human-like and relatable.

As outlined in "Brand teasing: How brands build strong relationships by making fun of their consumers," the researchers recruited 1,500 participants to imagine they saw a Valentine's Day special Pizza Hut advertisement. One group saw a "prosocial" ad and the other two groups saw either an "antisocial" or a purely funny ad.

The prosocial text ("Make your plans now for a cheap date that's almost as cheesy as you are") led to higher self-brand connection than both the antisocial ("Make you plans now for a cheesy date that's almost as cheap as you are") and the purely funny statements ("Make your plans now for a cheap and cheesy Valentine's date").

Brands can use data from their previous marketing campaigns to train AI and LLM tools and help them identify whether teasing has been effective in the past but you need to know your audience and their sensitivity. "You have to know who you're targeting, making sure they won't walk away feeling bruised and hurt," Oba says.

PARTNER WITH IPSOS:

THE #1 MOST INNOVATIVE INSIGHTS & ANALYTICS COMPANY IN THE WORLD

Top 50 GRIT Report

GreenBook
GRIT REPORT

**Meet our team onsite
at Quirk's Chicago!
Come see us at Booth #120**

Ipsos

Talking AI and GLP-1 in LA

The Quirk's Event returned to the Los Angeles area in late February and fortunately this time around, the Midwest-based Quirk's staff didn't bring with us the wintry weather that made 2023's gathering such an adventure. Instead it was sunshine and mild temps – perfect for soaking up some vitamin D in between sessions!

While more than a few wags made jokes about the omnipresence of AI in the presentations, I would counter by saying that the level of interest in and curiosity (and skepticism) about AI is still so high that we would be derelict in our duties if we didn't keep the topic front and center. Indeed, when we asked client-side LA registrants what subjects they would like to discuss with their peers in pre-event client-side-only breakfast roundtables, AI was the clear winner. (Thanks, btw, to all who showed up!)

We asked each table to jot down some notes during their conversations and here were some of their takes on AI:

- AI output can feel generic.
- A main benefit of it is lowering the researcher's cognitive load.
- For survey-writing, AI gives you a head start (themes, lists).
- Most AI vendor mentions/uses don't have true utility for corporate researchers.
- When bringing in actual users of the brand, AI research presents a risk.
- Some brands are implementing closed AI systems.
- AI may start to become a crutch (people aren't learning the nuances of talking to/listening to customers).
- AI will be used as a quick tool but researchers need to be the experts and show the value of deeper understanding.
- AI is still nebulous/needs guardrails/regulation.

- Big data was a threat but soon became a norm. Over time, new tools get implemented/used. AI will be the same.
- Triangulation of data is complex and will be a risk unless AI is more sophisticated.

What are some of the ways they are using AI? Coding open-ends; writing questionnaires/questions; feeding in data on trends (build own model); turning to Microsoft Copilot and ChatGPT; formatting PowerPoint reports; testing and writing concepts; image creation for innovation and concepts; image creation for product-selling on multiple platforms.

Getting a handle on GLP-1

Another topic that wasn't as ubiquitous but is no less potentially seismic is the use of GLP-1 medications. A session moderated by Betsy Pendergast of Dig Insights featured conversation with Liz Ackerley, Danone's senior director strategic insights and analytics, and Laurie Dewan, director, consumer insights for Abbott's Lingo Biowearables, in which the researchers outlined how their respective firms are trying to get a handle on what the drugs and their rapid embrace by consumers means for their respective businesses.

In Danone's case, Ackerley said, one of the tasks is figuring out how to talk about GLP-1 at-shelf. GLP-1 users need more fiber, protein and water in their diets and if your products are in that wheelhouse, do you underplay their relevance to GLP-1 users and risk having them fall out of consideration or do you overplay it and possibly turn off people who aren't using the medications or who don't want to be associated with them? For Lingo, its glucose-monitoring biosensors help users tune into how certain foods affect their bodies and with GLP-1 drugs changing the conversation around what's good and bad

in food, many consumers are rethinking their dietary choices. Dewan said storytelling has been helpful in getting internal groups to understand what a GLP-1-driven future might look like and how it affects their product and service offerings.

Beyond the already massive implications for food and beverage firms, there are potential impacts for insurance firms (could a healthier populace rewrite actuarial tables?), clothing manufacturers (what happens when people have to rework their entire wardrobes?), water utilities (will a nation of GLP-1 users strain our supply of clean water?), airplane and automobile makers, health care, dating apps, construction and building codes and more.

Estimates are that 1 in 12 U.S. adults have ever taken a GLP-1 agonist and within that group 6% are currently taking a GLP-1 medication. And further, nearly half of the country qualifies as being eligible for GLP-1 usage for weight loss. I doubt AI will be supplanted as a conference talking point anytime soon but given the breadth of its potential impacts, GLP-1 can't be too far behind. ⓞ

©Clare Pix Photography www.clarepix.com

Joe Rydholm can be reached at joe@quirks.com

Future. Proven.

Envision your brand's **future.**

Prove it's potential.

Tech-enabled insights that drive successful innovation.

Dig Insights

home to...

ebco   Upsiide   IGNITE360

INNOVATIVE
PRODUCTS & SERVICES

Q Methodologies, techniques and technology are rapidly changing in the marketing research and insights industry. New products and services are being released at an ever-faster pace. How can you keep up on what is new? Quirk's has you covered. In this section, you will find some of the newest and most innovative tools and services to keep your research up to speed. From the latest in software, technology and methodologies, these are the products and services you will want to know about.

Accelerate insights! Simplify analytics with Ascribe!

In today's fast-paced world, analyzing open-ended comments shouldn't be time-consuming. Whether coding survey responses or processing customer feedback from websites and social media, Ascribe's AI-powered tools – Theme Extractor, Ask Ascribe and Visualizations – deliver better text analysis results with minimal manual effort, up to 90% faster.

Theme Extractor: Precision results. Unparalleled speed!
Automatically analyze over 95% of open-end responses with exceptional accuracy, generating a human-like codebook with structured nets and descriptive theme-based codes. No taxonomies, rule sets or training examples needed – just fast results and now with improved reliability.
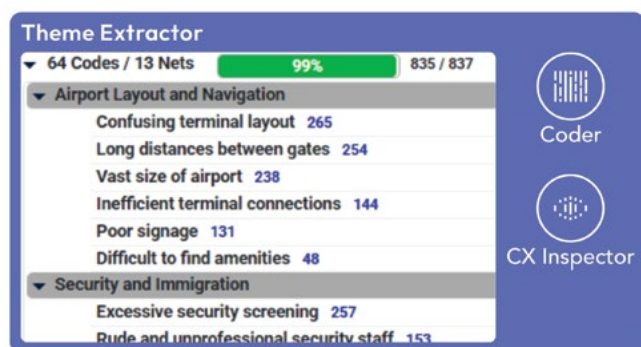
Ask Ascribe: Interview your data. Just ask!
Ask questions of a dataset and immediately receive insights, summaries and reports based on the analysis. Whether identifying key themes, exploring customer emotions or pinpointing areas for improvement, Ask Ascribe helps you find answers.

New Visualizations: Instantly reveal insights
Dynamic infographics and charts highlight patterns, trends and sentiment at a glance. Apply filters or drill down into the comments to uncover powerful insights fast.

With over 25 years of experience, Ascribe continues to innovate to deliver the best results from the latest gen AI technologies. For market researchers, CX professionals and corporate analysts, Ascribe's AI tools simplify workflows, uncover deeper insights and drive better decisions – faster.

Make open-end analysis easy.
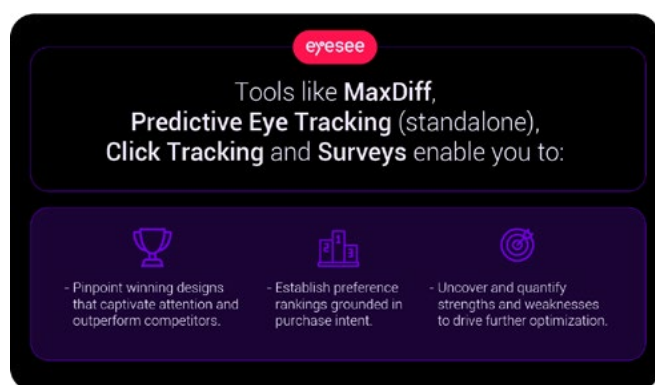For more info, visit **ascribe.voxco.com** or scan the QR code.

Fast, scalable and cost-efficient AI-powered pack testing framework

Designing or redesigning product packaging is complex and costly, with investments reaching up to 10% of development costs. A structured, timely and cost-efficient approach that prevents missteps in the long process with a high number of iterations is needed to ensure packaging success. That's where our three-stage framework comes in: Pack Screening Plus, Pack Validation and Health Pack Check.

Streamline innovation with smart research
In early ideation, Pack Screening Plus quickly filters concepts. Tools like MaxDiff, Click Tracking and Predictive Eye Tracking – powered by an AI model trained on 11.5 million+ gaze points – pinpoint attention-grabbing designs, rank preferences and reveal optimization areas.

eyesee

Tools like MaxDiff,
Predictive Eye Tracking (standalone),
Click Tracking and **Surveys** enable you to:

- Pinpoint winning designs that captivate attention and outperform competitors.
- Establish preference rankings grounded in purchase intent.
- Uncover and quantify strengths and weaknesses to drive further optimization.

Validate in realistic environments
When strong candidates emerge, Pack Validation tests designs in a virtual store. Eye-tracking and findability analysis uncover how shoppers navigate shelves while surveys and reaction time measurement add consumer feedback.

Perfect the final design
Before launch, Health Pack Check delivers an AI-powered pre-launch evaluation. It analyzes areas of interest, generates heat maps and validates brand alignment, likeability and purchase intent – empowering teams to refine designs with confidence.

Innovate with confidence
This agile, research-driven framework helps brands optimize packaging, reduce uncertainty and speed up time-to-market. Whether screening concepts, validating designs or doing a final check, using the right tools at the right time makes successful pack innovation achievable.

www.eyesee-research.com

eyesee

Show them the money: What are you doing to leverage visible cash incentives?

Have you ever heard the saying "cash is king?" In a world where digital currency, online payment systems and contactless tap-to-pay methods have become the rule versus the exception, a dollar bill – or even a $5, $10 or $20 bill – is an effective way to promote panel recruitment and push-to-web survey notification mailings.

NPC works with several organizations which utilize visible cash incentives to entice recipients to join a panel or take a survey. This what's-old-is-new-again approach with mail has been successful time and again for survey research organizations.

One research group that used e-mail, text and social media as its primary recruiting methods for decades tried something different with a physical mailing that used a $5 bill – visible in the oversized envelope window – with the goal of grabbing the attention of its target audience, encouraging them to open the envelope and complete a survey.

This visible cash incentive approach works
The research group achieved a 10% response rate using a cash incentive compared to a much lower rate when using an e-mail-only recruitment method.

When research is used to drive decision-making that impacts millions of people, the highest levels of accuracy and accountability throughout the survey printing, mailing and data-capture processes are critical to delivering your customers the highest-quality data.

Find out how the visible cash incentive approach, and other print and mail strategies, can benefit your data collection efforts at www.npcweb.com/surveys.

NPC®
www.npcweb.com/surveys

Thinking 360° to uncover future trends and drive innovation

Staying ahead of trends in innovation is vital to maintain a competitive edge, but clients say ideation can feel cumbersome and too slow. CSS's innovative 360° Future Casting helps businesses uncover future trends with the power of creators and validates their impact among target consumers to provide actionable and timely insights that drive strategic decision-making.

Why choose CSS's 360° approach?
CSS's unique approach brings together industry creators, influencers, target consumers, AI and predictive intelligence to identify and prioritize future trends and white-space opportunities in terms of sizing, timing and category impact with accuracy and foresight.

Combining qualitative and quantitative methods, our three-phase process ensures that you not only identify emerging trends but also understand their potential impact on your business.

Phase 1: Influencer/creator trend discovery
Augmented intelligence that taps into generative AI alongside existing knowledge and insights identifies hypothesized trends which are augmented and curated. Through

in-depth interviews with influential creators, who have their finger on the pulse of your category, we can evaluate, shape and also uncover the latest and future trends that matter to your business.

Phase 2: Influencer/creator trends survey
Building on qualitative findings from Phase 1, a quantitative survey validates and prioritizes these trends. This survey, with a larger group of creators, provides a robust dataset

serving to further sharpen and build relevant language around emerging trends as well as sifting out recessive trends.

Phase 3: Future casting prediction market
The final phase uses our agile predictive market solution, HUUNU®, to validate and prioritize the trends through a quantitative consumer prediction market, gaining valuable insights into future consumer needs and opportunities for innovation.

The CSS advantage
With CSS's 360° Future Casting approach, you have a single-source method to engage creators, predict trends and validate their impact among target consumers, enabling you to make informed strategic decisions and stay ahead of the curve.

Don't get left behind, contact learnmore@css-pi.com.

www.crgglobalinc.com

Harmon Research unveils two game-changing innovations

Harmon Research employs a robust quality assurance program called DataDefense that reviews data before, during and after the survey to ensure data integrity and reliability at every stage of the survey process. This program now includes two innovative features designed to enhance data protection and survey engagement.

Fraud prevention like you've never seen before

Detecting and preventing fraudulent responses is a persistent challenge in market research. To address this issue, NoBot Game-Based Fraud Detection offers a more effective alternative to traditional CAPTCHA tests. Rather than relying on easily bypassed verification methods, NoBot requires participants to complete a simple puzzle before accessing a survey. With over 100 unique variations, this approach significantly reduces the likelihood of bot-generated responses and it can easily be added to your surveys.

Beyond game-based verification, NoBot incorporates additional security measures, including:

- **Real-time bot detection and blocking** using blacklisted IPs and threat intelligence.
- **Advanced bot management** filtering out malicious actors via real-time digital fingerprinting, report analysis and AI pattern detection.
- **Customizable security rules** enabling tailored fraud prevention strategies.
- **DDoS protection and rate limiting** preventing suspicious traffic surges.

These enhancements help ensure that survey responses are authentic, improving data reliability and research results.

Introducing Smart Probing: Improve your insights

One common limitation of traditional surveys is the tendency for respondents to provide brief or shallow open-ended responses. Smart Probing is designed to mitigate this issue by using AI to analyze responses in real time and generate contextually relevant follow-up questions.

Key benefits of Smart Probing include:

- **More detailed responses** as respondents naturally expand on their initial answers.
- **Improved data quality** with richer insights captured through AI-driven prompts.
- **Higher engagement** as participants feel more involved in the survey process.
- **Enhanced actionability** providing deeper insights for data-driven decision-making.

With DataDefense, Harmon Research continues to advance data quality standards in market research. By integrating NoBot and Smart Probing, we are enhancing both the security and effectiveness of survey methodologies, ensuring more reliable and meaningful insights for researchers.

Ready to experience the future of research? Let's talk!

www.harmonresearch.com

QUIRK'S IN FOCUS

A digest of survey findings and new insights for researchers

••• technology research

Falling for a digital con

The perils of online love

As millions turn to dating apps, social media and messaging platforms to find love, the rise in AI-driven romance scams, fraudulent dating apps and deepfake deceptions are making it harder than ever for hopeful romantics to find a genuine connection.

Sixty-two percent of respondents say they have used dating apps, social media or messaging platforms to meet potential partners. According to a McAfee survey, men (31%) are more likely than women (17%) to be actively dating online. Younger users are the most active online daters, with 73% of 18-24-year-olds using Tinder while platforms like Snapchat (29%) and TikTok (25%) become increasingly popular for dating.

Scammers aren't just using random AI-generated personas though, they are also preying on the trust and admiration towards well-known figures. Concern over deepfake deception in romance scams is rising fast and for good reason. One in five people (21%) have been approached on social media by someone pretending to be a celebrity. Among those who fell for the scam, 33% lost money.

Romance scams aren't just happening on dating apps, they are also playing out across social media, messaging platforms and through

fraudulent websites designed to mimic legitimate dating services. Dating apps (78%) are the place people most frequently encounter potential romance scams, followed closely by social media (72%) and text or e-mail scams (65%). Fifty-two percent have either been scammed out of money, valuables or pressured to send gifts by someone they met online.

McAfee conducted this survey online in February 2025, among 1,000 U.S. adults.

••• shopper research

Get us in, get us out

Shoppers, diners embrace new tech

Always seeking to save time and money, consumers are looking for more smart technology, enhanced checkout options, product personalization and convenience in their grocery, gas/c-store and dining experiences. Digital commerce solutions provider NCR Voyix found that 77% of shoppers prefer self-checkout because it is faster than staffed checkout lanes. Over one-third (36%) say they prefer it because

it has shorter lines while 43% prefer to bag their own items. Looking at a generational snapshot, Gen Z and Millennial grocery shoppers are the biggest adopters of self-checkout lanes with the majority of Gen Z (63%) shoppers opting for it along with nearly half of Millennials (45%). Sixty percent of shoppers who do not frequent self-checkout lanes would be more inclined to do so if grocery stores made it easier to check out with more than 15 items.

Grocery stores are implementing more smart technology at checkout and shoppers are taking notice. Forty-two percent of consumers have encountered a camera detecting skipped items and prompting them to try again, 32% have noticed scanners that can recognize products, 28% have seen age/ID verification technology and 12% have used smart carts/baskets which do not require shoppers to scan a barcode and instead use cameras and weight sensors to detect products.

More than half of consumers (54%) expect the cost of their typical grocery purchases to increase in 2025. As such, many more are making a concerted effort to shop where they can find the best deals and are looking for rewards and loyalty programs to save. Seventy percent of survey respondents say they are members of a grocery store loyalty

program, outpacing fuel convenience (54%) and restaurants (51%).

Fuel and convenience stores are raising the bar. Most consumers (53%) have gone out of their way to visit a specific gas station because they favor its convenience store. Some consumers prefer the food options of specific convenience stores (27%), others like the loyalty programs (37%) and easy ways to pay (36%).

Inflation is driving higher restaurant prices and consumers are feeling the effects. Most consumers (84%) choose limited-service restaurants to save money. In the past six months, 35% of consumers have dined at a fast-casual restaurant over five times. By comparison, in the past six months, 26% of consumers have dined at a full-service restaurant more than five times.

Fifty-five percent of survey respondents have cut back on their delivery habits because of inflation. Thirty-eight percent are ordering less in general and 17% say they are ordering from less-expensive restaurants. Higher prices have also affected how consumers tip. Fifty-six percent either tip less or only tip at full-service restaurants. When asked what technologies they would like to see more of from restaurants, self-service kiosks (39%), table-top ordering (37%) and digital payments (32%) were among the top three.

NCR Voyix commissioned a blind survey of 1,044 American consumers in November 2024.

••• entertainment research

Come with me and escape

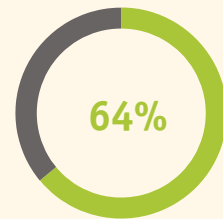### Music-fueled nostalgia drives travel choices

While dedicated music fans often plan trips to see their favorite artists on tour, a festival of must-see performers is an even bigger draw. Sixty-one percent of those surveyed by online travel agency justfly.com agreed that music festivals are becoming a new reason to travel.

Those willing to travel for a concert or music festival say the average amount they would spend, excluding ticket costs, is $1,800. Seventy-six percent say they would travel to another city or country for a concert or music festival if tickets were easier to obtain. While 70% believe concerts and festivals positively affect host cities, 54% feel such events can overwhelm the authenticity of destinations, transforming them into party hotspots. This consensus proves that festivals like Coachella, Bonnaroo and Lollapalooza attract attendees from all over the world as they offer not just music but also cultural experiences.

Many travelers feel travel nostalgia when listening to certain songs or genres. More than half of respondents (64%) reported that specific songs or music genres remind them of past vacations. This is especially true for 25-34-year-olds, with a substantial 75% of this age group agreeing with this sentiment. Moreover, 63% say certain music makes them want to visit specific locations. The same age group also led the charge on this front, with 76% in agreement.

This correlation between nostalgia and music indicates that by listening to a certain song, travelers are more driven to revisit previous destinations where they hold fond memories. In addition, they're also more likely to explore destinations thanks to the indirect, lyrical recommendations of their favorite artists. Forty-two percent of respondents are likely to travel to destinations mentioned in popular songs. Destinations referenced in famous lyrics or associated with a genre, such as Nashville for country music or Jamaica for reggae, hold powerful appeal for music enthusiasts.

The survey was conducted with 2,000 U.S. respondents.

Musical nostaglia

64%

More than half of respondents reported that specific songs or music genres remind them of past vacations.

How far would you go?

Those willing to travel for a concert or music festival say the **average amount they would spend**, excluding ticket costs, is

$1,800

76%
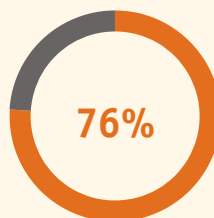
76% say they would travel to another city or country for a concert or music festival **if tickets were easier to obtain**.

••• technology research

Retailers turn to tech for efficiency boosts

Improving CX with AI

Retailers are investing in AI to improve return management, automate customer service and monitor product availability. Operating company Honeywell found that eight out of 10 retailers plan to increase the use of automation and AI across their operations to adapt to changing consumer behaviors, enhance employee skills and improve efficiency for shoppers.

Thirty-five percent of major retailers plan to significantly increase their AI investment. More than half of the surveyed retail leaders say that AI improves employee retention and 52% believe AI can help employees progress

Shoppers want AI to help them

68%
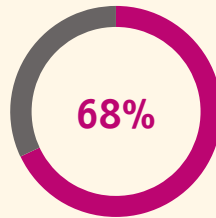
68% of consumers say they have **used AI in their shopping experience.**

more quickly in their careers, expand their soft skills and continuously provide value to their jobs.

More than half (61%) of retail executives say that AI tools make the job easier for employees, while 55% say they increase job satisfaction. This aligns with the retail industry's increasing focus on how employee

satisfaction can support the customer experience for their businesses.

AI is also playing an increasingly important role in improving the customer experience for shoppers, both when shopping online and in person, offering them better access to information, speedier transactions as well as an easier way to compare prices. Two-thirds of surveyed consumers (68%) reported that they have used AI while shopping to ask a question through a chat bot, compare prices for an item across retailers or summarize customer reviews. Comparing prices across stores is by far the most sought-after use for AI (53%) followed by checking product availability (41%) and having a more seamless checkout experience (34%).

Honeywell commissioned Wakefield Research to conduct the Honeywell Executives Survey and the Honeywell Retail Consumers Survey from December 2-8, 2024, among 100 U.S. executives and 1,000 U.S. adults.

insights
ASSOCIATION

fieldWORK

L&E research

GreenBook
DIRECTORY

SĀGO

FOCUS ROOM
POWERED BY FUEL

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

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

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

#facetofacemrx

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

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

FocusFORWARD

QUIRK'S
MEDIA

i·view

h
Herron Associates, Inc.
Opinion and Marketing Research

JACKSON RESEARCH
A cut above

FUEL

AW
ADLER WEINER RESEARCH

QRCA
Connecting. Educating. Advancing.

••• shopper insights
The shopping danger zones

For some Americans, shopping isn't just about finding the perfect items, it's about feeling safe while doing so. According to LiveView Technologies, nearly one-third (32%) of women say that fears about parking lot safety influence their decision to shop in person and over half of the people surveyed (54%) feel the least safe in parking areas compared to other retail spaces.

While crowded stores and long checkout lines are common frustrations among shoppers, parking lots present a unique set of challenges. Parking structures are a leading concern with 59% of women and 47% of men feeling the least safe in parking lots and garages, compared to just 17% of all respondents who feel unsafe inside retail stores. Poor lighting was identified as the top parking lot safety concern by 69% of women and 56% of men.

Sixty-six percent of respondents say that visible security cameras in public spaces make them feel safer. Women overwhelmingly favor surveillance measures, with 77% agreeing that cameras contribute to their sense of security. Among parents with children under 18, 78% are comfortable with security cameras in public areas, with 68% believing cameras effectively deter crime.

Safety concerns across regions reflect differences in local culture and attitudes toward public surveillance. Eighty percent of New Yorkers support public surveillance measures and 72% report that security cameras in public spaces help increase safety. In California, 39% favor armed security guards, compared to 49% of people across the rest of the United States. Meanwhile, 47% of Californians support government regulation of security cameras, while 45% of Texans oppose it.

LiveView Technologies conducted this survey among 2,000 U.S. consumers in November 2024.

••• real estate research
I'm staying put

They say to never say never, but with nearly half (43%) of Baby Boomers saying they will not sell their homes, never may be accurate this time. More than one-third (34%) of U.S. homeowners say they won't sell their home and another 27% say they wouldn't consider selling for at least 10 years. Roughly one-quarter (24%) of homebuyers plan to sell in five to 10 years, 8% will sell in three to five years and 7% expect to sell within the next three years, finds real estate company Redfin.

Broken down by generation, older homeowners are more likely than their younger counterparts to say they will never sell, including 34% of Gen X owners. Twenty-eight percent of Millennial and Gen Z owners are not expecting to sell. The fact that the lion's share of homeowners say they'll never sell is one reason new listings are below pre-pandemic levels in much of the country, though listings have started to tick up in recent months. Just 25 out of every 1,000 U.S. homes has changed hands in the first eight months of 2024, the lowest turnover rate in decades.

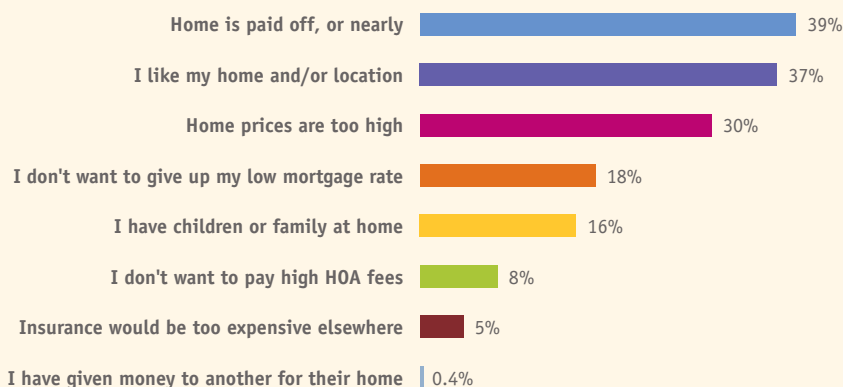Nearly two in five (39%) homeowners who don't plan to sell anytime soon say it's because their home is almost or completely paid off, making that the most-cited reason. Homeowners who have paid off their mortgage are motivated to remain where they are because they only need to pay for things like property taxes and HOA fees. Almost as many respondents (37%) say they are not selling because they simply like their home and have no reason to move.

Affordability is another major reason homeowners are hesitant to sell. Nearly one-third (30%) of respondents say they are staying in their current home because today's home prices are too high and 18% don't want to give up their low mortgage rate. This survey question was asked to respondents who have owned their home for at least six years and have no intention of selling within the next five years. Sixteen percent say their children or other family members are still living in their homes, 8% do not want to pay HOA fees and 5% claim that home insurance would be too expensive where they would want to move to.

Housing costs have risen significantly since before COVID-19. Home prices are up roughly 40% since then and the weekly average mortgage rate is 6.91%, up from just under 4% in 2019. More than 85% of U.S. homeowners with mortgages have an interest rate below 6%.

Redfin commissioned this survey from Ipsos in September 2024. The survey was fielded to 1,802 U.S. residents aged 18-65.

Reasons homeowners aren't selling

| Reason	Percentage
Home is paid off, or nearly	39%
I like my home and/or location	37%
Home prices are too high	30%
I don't want to give up my low mortgage rate	18%
I have children or family at home	16%
I don't want to pay high HOA fees	8%
Insurance would be too expensive elsewhere	5%
I have given money to another for their home	0.4%

••• automotive research

Still charged about EVs

Consumers concerned, but eager to buy

Despite ominous headlines about the state of the industry, U.S. consumers are continuing to invest in electric vehicles. Nearly half (47%) of Americans 25 and older plan to purchase an EV in the next five years and 21% plan to purchase one in the next one to two years. Twenty-seven percent have never driven an EV and only 7% currently own one.

Range anxiety (71%) and the availability of charging stations (46%) remain top concerns around EV ownership. Forty percent don't know where the closest charging station to their home is and are unsure of how to find one. Others are more concerned about

Are EVs safer than gas vehicles?

- 21% Yes
- 33% No
- 46% Same
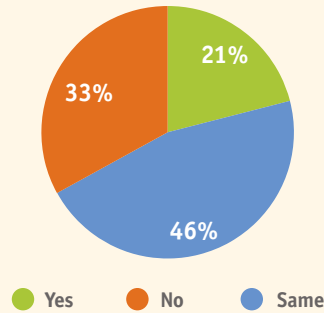
the upfront cost (31%) and 51% say they would purchase one today if it was not a factor.

Sixty-three percent expect maintenance costs to be higher with EVs compared to gas-powered vehicles and 42% believe their chances of needing roadside assistance are higher with an EV. Seventy-two percent worry about running out of battery before reaching

their destinations and are not sure how much safer they are than gas-powered vehicles.

Seventy percent would consider renting an EV to test it before purchasing, however 73% say they wouldn't know how to charge it if they rented one. Some drivers believe they would need help with an EV rental with 77% saying they would conduct their own research on how to drive and operate the vehicle. Only 13% of survey respondents had already rented an EV for business or personal use.

While many American drivers continue to express concerns about owning and operating an EV, 69% believe they are good for the environment. Forty-six percent say they are just as likely to purchase an EV than they were in 2023, 24% say they are less likely and 30% indicate they are more likely to buy.

This Verra Mobility survey was conducted online by Pollfish on November 15, 2024, among 2,000 Americans aged 25+.

24 TOP B2B RESEARCH COMPANIES

B2B research companies can provide the tools and techniques necessary to help gain customer insights for your business, whether you are a part of a small business or a Fortune 500 company. Respondents for B2B can be few and far between, but research companies that specialize in B2B research can provide hard-to-reach panelists and respondents like health care professionals, business decision makers, C-suite respondents or employees and workers in niche industries like construction or education.

With high-quality insights and offerings ranging from full-service to DIY, working in industries from health care to IT to CPG, these companies are equipped to help accelerate your research.

Adience

Founded 2020
Chris Wells, Managing Director

We're Adience. We're a B2B market research consultancy that gives you answers you can trust, from a team you will actually like working with. Traditional B2B market research is boring-to-boring, cookie-cutter and stale. Ours isn't. That's why powerhouse agencies and brands like Google and Maersk trust us. Got questions? Let's talk.

E-mail chris.wells@adience.com
Phone 1-646-799-5020
www.adience.com

Applied Marketing Science

Founded 1989 | 40-45 employees
John Mitchell, President and Managing Principal

Applied Marketing Science (AMS) is trusted by leading organizations across B2B, medical, industrial and manufacturing sectors because of our 35 years of experience delivering high-quality market research rooted in academia and powered by cutting-edge technology. Our skilled consultants combine decades of B2B research expertise with innovative methods, tested in the real world, to deliver actionable customer insights, empowering you to make crucial

decisions in product development and enhance customer experiences with confidence. Engage AMS for a fully outsourced study or request in-house training on a variety of research methodologies. Let us leverage our experience and custom AI tools to help you better understand your customers no matter where you are on your innovation journey!

Phone 1-781-250-3600
ams-insights.com/who-we-help

Azurite Consulting

Founded 2017
Eli Diament, Founder and Managing Director

Market research hasn't kept pace with today's business challenges – so we reimagined it. Azurite Consulting delivers strategic insights through custom market surveys and interviews, never relying on panels or expert networks. Our proprietary machine learning technology recruits hundreds to thousands of decision makers in niche B2B markets directly from your total addressable market, ensuring unmatched precision, data quality and scale. We equip investors and businesses with C-suite- and boardroom-ready insights to sharpen their competitive edge, validate investment opportunities, uncover go-to-market strategies and unlock growth potential. With data-driven conviction, we help you make your highest-stakes decisions with confidence. Reimagine the power of market intelligence – contact us to see why we're the fastest-growing and most trusted primary research firm in the industry.

Phone 1-732-606-5799
azuriteconsulting.com

Decision Analyst

Founded 1978 | 100 employees
Bonnie Janzen, President
Felicia Rogers, Corporate Executive Vice President

Decision Analyst offers an array of research services to help B2B firms develop winning business strategies. From new product development research to strategy development to strategy optimization, Decision Analyst helps B2B firms identify target markets of opportunity, optimize their products and services for those target markets and position those products and services to maximize market share. Product optimization studies, sales organization and development research, customer service optimization studies and advertising research to improve corporate communications are major areas of expertise. Research and analytics projects are conducted across the globe. We meld secondary data analyses, in-depth qualitative investigations, strategic survey research and advanced analytics and modeling to address complex B2B issues. Decision Analyst's strengths in statistics, mathematics, modeling and optimization provide a solid foundation to address the most difficult business and strategy issues.

Phone 1-817-640-6166
www.decisionanalyst.com

Dynamic Fieldwork

Founded 2016
Paul Donnelly, Managing Director
Colm Russell, Managing Director

As B2B data collection experts, Dynamic Fieldwork specializes in international data collection and fieldwork consultancy, delivering quality, cost-effective insights. Based in London, we manage complex multicountry B2B research across technology, manufacturing, financial services, retail, energy, biopharma and professional services. We provide qualitative and quantitative data collection, reaching even the most hard-to-access audiences. Our expertise supports customer loyalty, brand perception, product testing and market forecasting studies. From survey scripting and translation to sample management and data processing, we ensure precision at every stage. With global experience, we simplify B2B research – on time and within budget.

Phone +44 (0) 20-3292-2444
dynamicfieldwork.com

Harmon Research

Founded 2009 | 125 employees
Stephanie Vincent, Executive Vice President

Harmon Research is a leading B2B insights research company specializing in both quantitative and qualitative data collection. We conduct studies in over 43 countries, we bring global expertise to every study, helping businesses make data-driven decisions

with confidence. Our proprietary research panel undergoes continuous quality-control checks, ensuring high-quality, reliable B2B data. We take pride in DataDefense, our rigorous quality assurance program that reviews data before, during and after the survey process. To enhance data accuracy and engagement, we leverage innovative tools like NoBot and Smart Probing. NoBot, our game-based fraud detection system, eliminates bots by requiring interactive puzzle-solving before survey access, ensuring that only genuine business professionals take part in studies. Smart Probing, an AI-driven tool, dynamically generates contextual follow-up questions, allowing for deeper, more meaningful insights from B2B respondents. Harmon Research delivers high-quality B2B data for strategic decision-making.

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

High Beam Global (HBG)

Founded 2010 | 150 employees
Rajat Sahni, Founder

With more than 14 years of delivering quality research, High Beam Global (HBG) is one of the top-rated market research and data collection firms, globally. HBG's unparalleled research experience and domain knowledge adds an authentic layer of competitive advantage. Our clients call us their "trusted global partner in success." HBG stands out for its unmatched expertise in audience sourcing, leveraging an extensive proprietary database of more than 10 million business decision makers across industry domains and job functions. With in-house capability to utilize multimode research solutions, HBG becomes a top choice for researchers and advisors, globally.

Our team of 150 highly experienced and skilled researchers, interviewers/moderators and project managers ensures that each project is delivered within timelines and with utmost quality. We don't just help our clients in acquiring insights, we strive to add value at each level of our collaboration.

E-mail rajat.sahni@highbeamglobal.com
www.hbgknowledge.com

Ironwood Insights Group LLC

Founded 2017 | 300 employees
Brian Cash, VP Research Services

Ironwood Insights offers expert-level consultation and execution across a full-spectrum of insights services, including forward-thinking designs, industry-leading data collection services and leading-edge analytical frameworks. From the inaccessible C-suite to the multi-hat small business owner to the never-in-one-place tradesperson, Ironwood offers unsurpassed experience across the full spectrum of B2B audiences. We understand when and how to deploy multimethod data collection approaches – whether phone, online, in-person or mixed-methodology – to capture the most comprehensive view of B2B target audiences and understand the most complex decision-making and buying decisions. The synergy of our qualitative and quantitative capabilities allows us to bring the right data collection methods and research designs to ensure the success of the research outcomes and optimize the client's budget across even the most complex B2B projects. Contact us to learn more about how Ironwood provides clients with actionable, durable business insights that create a lasting competitive advantage.

E-mail info@ironwoodinsights.com
Phone 1-602-661-0878 x2110
www.ironwoodinsights.com

Karchner Marketing Research LLC

Founded 2003
Helen Karchner, CEO/Co-Founder

Simply put…KMR Founders Helen and Mike offer a TRIFECTA of EXPERTISE: Hybrid research design with qualitative moderation, relatable analysis and activation workshop sessions. First, ground-floor engagement with stakeholders and internal clients is key. Next, as your strategic partner, we ensure objectives are met during our custom hybrid methodology designing. Finally, the analysis and recommendations for implementation are discussed within established (local/global) activation sessions, ensuring communication is commensurate for session participants. Whether gleaning insights into existing or new products, offering expanded services, assessing competitive market landscapes, improving messaging and advertising campaigns/packaging or launching exploratory research, KMR delivers! Utilizing our proprietary integrative hybrid methodology and behavioral science, coupled with our proven communication skills, we gain respondents' trust, giving them validity and credence to their individuality, while uncovering the drivers of their professional story flow. KMR – your strategic partner from quick gut-check projects to multiphase global studies – value establishes KMR's prominence!

E-mail helen@kmrinsights.com
Phone 1-610-564-9624
www.KMRResearchStudio.com

Key Lime Interactive

Founded in 2009 | 50+ employees
Eugenio Santiago, President

Key Lime Interactive partners with the world's leading brands to create extraordinary digital experiences that drive customer engagement and loyalty. As a full-service UX research agency, we specialize in human-centered strategies that solve complex challenges, optimize customer journeys and fuel digital transformation. Our core services include qualitative and quantitative UX research, customer journey mapping, inclusivity audits and usability testing – designed to align with business goals and exceed user expectations. Trusted by Fortune 500 companies, we turn insights into action, helping global brands deliver seamless, impactful and memorable experiences that set them apart.

E-mail sandra@keylimeinteractive.com
Phone 1-305-809-0555
www.keylimeinteractive.com

MartLenz Knowledge Services

Founded 2017 | 80 employees
Adam Marra, Assistant Vice President, NA

One hundred percent verified professional audiences; MartLenz is redefining the ideal measure of quality and trust in global B2B research. Clients appreciate our self-sufficiency in all aspects of research, no partners or API integrations needed. With access to our organically built community of over 500K professionals and advanced recruiting tech (AI/ML algorithm "Kyrios") MartLenz can extend your stakeholder reach across 60+ markets globally. Our quality guarantee is backed by our Hybrid Screenshare interview methodology, allowing us to qualify a respondent several times before the engagement takes place, never disrupting timelines or pace. As an extension of your team, we deliver top-notch service and attention, offering expert consultation and analysis. Clients value our quick access to common audiences (e.g., ITDMs, HRDMs, Realtors, financial advisors, HNWI) and our ability to reach niche audiences that other providers can't or do not care to try and accommodate. It's a different way to better insights.

E-mail adam@martlenz.com
Phone 1-845-596-8239
www.MartLenz.com

Murray Hill National

Founded 2013 | 35 employees
Susan Owens, COO
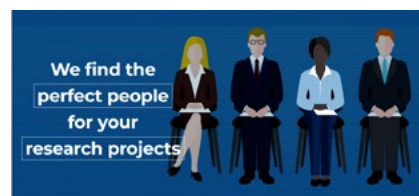
Clients trust Murray Hill National with thousands of studies per year as their research partner. In return, we deliver valuable solutions and high-quality recruitment and data collection for their consumer, health care and business-to-business. Specializing in all methodologies and audiences, we have 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 4 million consumers, 650,000+ B2B executives/professionals, 750,000 physicians, nurses and more, and we organize 150+ patient panels. Any audience, any methodology specializing in B2B and health care. 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

myCLEARopinion Insights Hub

Founded 2008
Mitch Henderson, Co-CEO

Not all B2B samples are created equal. Tired of hitting dead-ends when sourcing qualified B2B respondents? myCLEARopinion Insights Hub is your gateway to hard-to-reach professionals across specialized B2B industries. Powered by our exclusive relationship with a leading media company that publishes top trade journals, we tap directly into engaged skilled trades industry communities. This gives us a recruitment reach and high-quality data that others simply can't match. Our proprietary database connects you to skilled professionals in HVAC, engineering, architecture, construction, maintenance, flooring, roofing, plumbing, mechanical systems, packaging, manufacturing, safety, security and food and beverage. Beyond access, we offer seamless programming, data collection services and AI-powered dashboards to bring your research to life. With decades of experience as market researchers ourselves, we understand your challenges and deliver solutions that work. Stop settling for low-quality panels or outdated lists. Choose the

sample partner built on industry connections and relationships. Visit myCLEARopinion Insights Hub to learn more.

E-mail info@mcoinsightshub.com
Phone 1-248-633-4930
www.myclearopinioninsightshub.com

Precision Research Inc.

Founded 1959 | 25-49 employees
Scott Adleman, President

Precision Research specializes in recruiting participants for a wide range of B2B decision makers for both in-person and virtual research projects across the U.S. Industries we recruit for include health care, construction, manufacturing, finance, logistics, information technology, food services and restaurants plus many more. We have been recruiting for more than 50 years. For in-person studies, we can recruit to your preferred location or our Chicago headquarters, which offers a versatile space designed to accommodate individual in-depth interviews (IDIs) or group sessions. Our first-floor location features wide doors and ample space, making it ideal for testing various types of health care equipment, product testing including food testing using our commercial test kitchen.

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

Progresso Research

Founded 2018 | 25 employees
Vikram Nayar, CEO

Progresso Research excels in market research with extensive global respondent access through proprietary panels. Their expertise spans consumer, B2B and health care sectors, providing deep insights into behavior, trends and market dynamics. They recruit high-quality panels using rigorous methods, ensuring accurate and reliable data. Advanced technologies and methodologies enhance their research processes, delivering quick and actionable insights. Their global reach allows for cross-cultural research, aiding businesses in market expansion. Committed to ethical practices, Progresso Research ensures data privacy and integrity, making them a trusted partner for comprehensive and reliable market research.

Phone 1-201-345-6045
progresso-research.com

Pureprofile

Founded 2000 | 245 Employees
Martin Filz, CEO

Pureprofile is a leader in B2B research, delivering high-quality data through rigorous profiling, vetting and verification of our online panels – ensuring unparalleled accuracy for our clients. We provide access to high-quality sample and have conducted studies in over 100 countries. With hundreds of data points on our global

panellists, we enable rapid access to niche and hard-to-reach audiences, delivering deeper insights. Our expertise spans CATI, video survey solutions and utilizing AI to offer the most efficient and cost-effective methods to conduct online research. We cover a vast range of industries, precisely targeting specific roles and company sizes. Additionally, we offer end-to-end services, including questionnaire design, scripting, translation, programming, data processing and reporting. Operating worldwide, we provide around-the-clock support to help businesses make smarter, data-driven decisions.

E-mail salesemea@pureprofile.com
www.business.pureprofile.com

QuantifyAI

Founded 2024 | 10-15 employees
Adam Stephenson, CEO

QuantifyAI is rewriting the rulebook on market research. Our proprietary B2B and consumer panel, Opinion Elite, utilizes LinkedIn and Facebook verification with cutting-edge AI and behavioral analysis to validate respondent identities. No more bots, no more fraud – just real, engaged participants. As researchers ourselves, we understand the frustration of poor data quality: delayed timelines, time-consuming data cleaning and the risk of making business decisions based on flawed data. Our rigorous quality control measures and advanced AI validation techniques safeguard our survey environment to ensure engaged and truly validated respondents. Your research deserves better – your insight, our expertise.

E-mail adam@quantifyai.co
Phone 1-858-692-1325
www.quantifyai.co

Questionlab

Founded 2016 | 50+ employees
Scott Jones, CEO

Questionlab is a global quantitative market research company with a U.S.-based team that specializes in delivering high-quality B2B samples across North America, EMEA, LATAM and APAC countries. We have access to all levels of decision makers, executives, SBOs, construction pros, finance/banking pros, C-level and hard-to-reach professionals among small one-person shops to large organizations with thousands of employees. Our proprietary, validated and engaged online panels give you access to millions of business professionals allowing you to go after the most niche B2B audiences. We are easy to work with, do not charge any project minimum or setup fee, have 24-hour support including weekends/holidays and use in-house quality applications to provide some of the lowest toss-out rates in the industry. Please reach out to sales@questionlab.com with any request.

E-mail sales@questionlab.com
Phone 1-480-340-1721
www.questionlab.com

Quest Mindshare

Founded 2003 | 130 employees
Greg Matheson, Co-CEO Quest Mindshare
Joe Farrell, Co-CEO Quest Mindshare

Launched in 2003 to meet the needs of technology companies, Quest began survey operations to 45,000 persons employed in technical fields. With fast-growing panels and a focus on utilizing the greatest survey security technology, Quest Mindshare is now well-known to provide the most extensive and flexible groups of online panel assets for every B2B and consumer need. Quest's largest panels reside in North America and Europe but our project management team can superbly tackle your projects anywhere in the world. Let Quest know what your hard-to-find audience is (from ITDMs, financial DMs, web developers to moms with babies, music ratings and everything in between) and the team of market research experts and professionals will either offer support through the diverse panel assets or recommend ways to achieve your target.

E-mail sales@questmindshare.com
Phone 1-416-860-0404
www.questmindshare.com

RONIN

Founded 1998 | 250+ employees, recruiters and interviewers
David Burdon, SVP

RONIN is the industry leader for hard-to-reach B2B audiences, connecting you to genuine and verified business professionals. RONIN ensures expertise and access to real people from the audiences that you care about, real data and actionable market research results across a wide range of industries. In a market saturated with poor data, RONIN has evolved beyond traditional panels to meet this challenge. We understand that connecting real decision makers takes expertise that panels cannot offer. Through innovative quantitative and qualitative data collection methods, our commitment to authenticity empowers you with reliable insights, transforming data into meaningful stories. From tech developers to asset managers or from farmers to politicians, RONIN has the scope, the expertise and the technology to deliver your high-end research needs, regionally, nationally and globally.

E-mail ronin_bid@ronin.com
Phone +44 (0) 20-3640-2752
www.ronin.com

SIS International Research

Founded 1984 | 50 employees
Ruth Stanat, CEO

Established in 1984, SIS International Research is a global market research and consultancy firm, specializing in B2B. SIS has local field teams in over 100 countries. Our firm offers desk research which delivers market sizing, competitive intelligence, total addressable markets and channel intelligence. We recruit and conduct qualitative interviews with C-level executives in a wide range of sectors including industrial, consumer and manufacturing sectors. We also deliver quantitative research and data analytics for market demand, pricing intelligence, across a wide range of B2B sectors. We also deliver go-to-market strategy in domestic and international markets. We deliver actionable data for decision-making.

E-mail Restanat@sisinternational.com
Phone 1-917-546-0640
www.sisinternational.com

Symmetric, A Decision Analyst Company

Founded 2016 | 100+ employees
Jason Thomas, CEO
Arianne Larimer, President

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

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

Talk Shoppe

Founded 2010 | 14 employees
Liana Morgado, CEO and Founding Partner
Ruth Behr, Managing Partner

Talk Shoppe is a premier bespoke consumer research agency delivering customized solutions that provide clarity, direction and actionable insights. We help you make informed decisions, drive growth and stay ahead in a dynamic marketplace – all with global reach and white-glove service. Founded by Liana Morgado and later joined by Ruth Behr, Talk Shoppe is an Ogilvy award-winning, women-owned and minority-owned agency. After years in one-size-fits-all research, they saw a better way. For 15 years, we've built a world-class client list by prioritizing tailored approaches, thoughtful analysis and meticulous design. Acting as an extension of your team, we craft research solutions that align with your strategic goals, ensuring impactful results.

E-mail hello@letstalkshoppe.com
www.letstalkshoppe.com

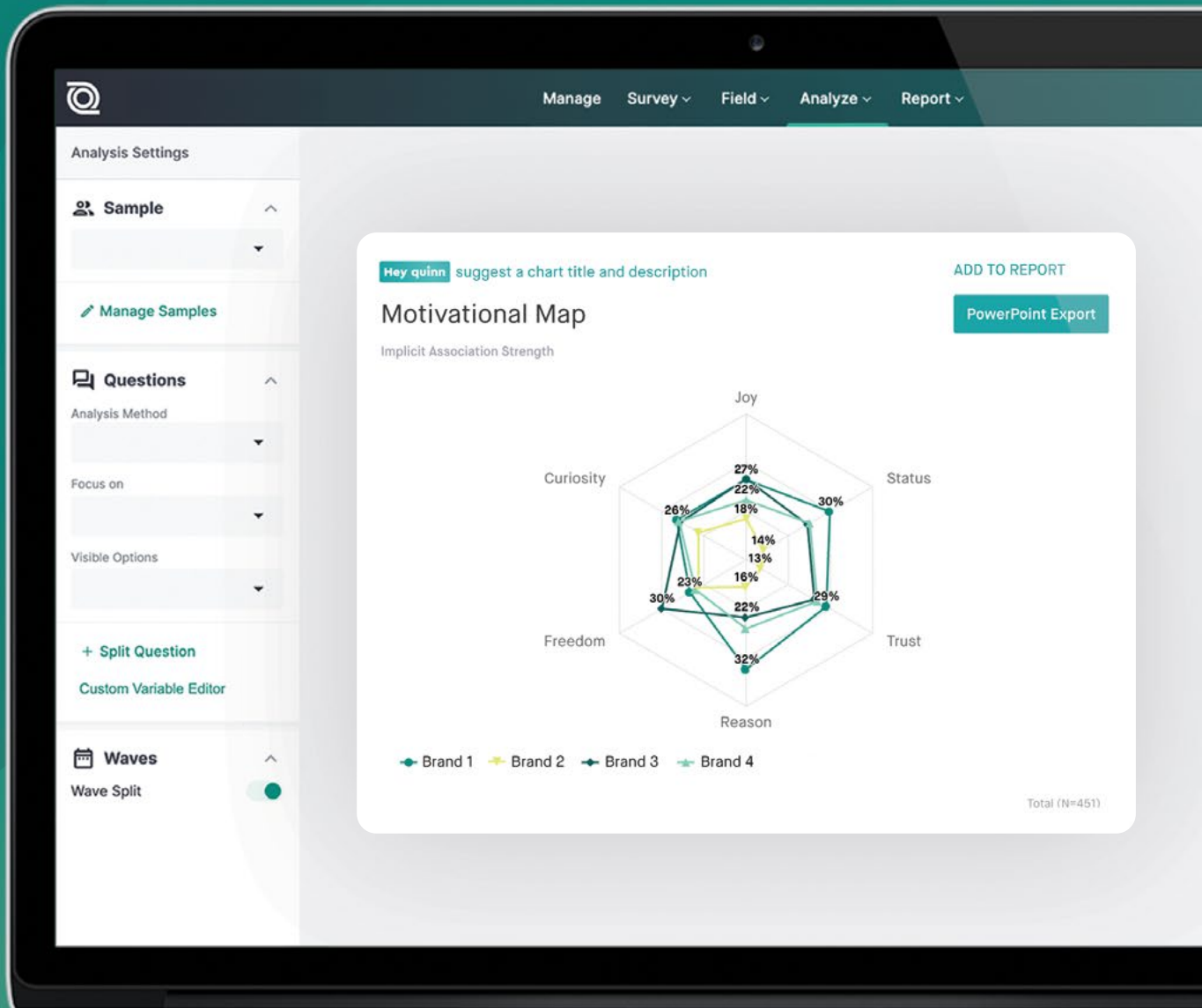## Verve

Founded 2008 | 150 employees
Andrew Cooper, CEO

Verve – where human truth fuels AI-powered insight. At Verve, we pioneer AI-powered insights grounded in human truth, transforming B2B decision-making. Our cutting-edge platform, Verve Vero, combines high-quality proprietary data, real people, best-in-class gen AI and expert consultants to deliver sharper, faster intelligence. Our award-winning Verve Intelligent Personas (VIPs) – named Innovation of the Year 2024 – allow brands to simulate even the hardest-to-reach audiences, from C-suite executives to industry leaders. By blending proprietary datasets, cultural expertise and AI, we turn complex B2B data into clear, actionable intelligence. That's why global brands like Mars, Samsung and UBS trust us to drive smarter, more strategic decisions. From future-proofing strategies to optimizing marketing and innovation, our AI-driven simulations give you a commercial edge. Ready to see what's possible? Let's talk.

E-mail g.holt@addverve.com
www.addverve.com

quantilope

The Consumer Intelligence Platform

Offering 15 fully automated advanced research methodologies, an easy-to-use tracking solution, and on-going support from a team of expert researchers.

Manage   Survey ⌄   Field ⌄   Analyze ⌄   Report ⌄

Analysis Settings

👥 **Sample** ⌄

✏ Manage Samples

💬 **Questions** ⌄

Analysis Method

Focus on

Visible Options

＋ Split Question

Custom Variable Editor

📅 **Waves** ⌄

Wave Split

Hey quinn suggest a chart title and description

ADD TO REPORT

Motivational Map

PowerPoint Export

Implicit Association Strength

Joy

27%
22%
18%
14%
13%
16%

Status

30%

Curiosity

26%

23%

29%

Trust

30%

22%

Freedom

32%

Reason

◆ Brand 1   ◆ Brand 2   ◆ Brand 3   ◆ Brand 4

Total (N=451)

Practical tips on...
B2B MARKETING RESEARCH
...from the Quirk's archives

Welcome to our new feature! In each issue, Pro Insights will offer a handful of tips and commentaries on a single topic, drawn from our vast library of past magazine and e-newsletter articles. Future installments will include customer satisfaction research, health care research and qualitative research. Let us know (joe@quirks.com) if there are subjects you'd like us to tackle. As always, you can start your own search by accessing these and thousands more articles for free at www.quirks.com.

Let your stakeholders see their customers in action on the job

In her article "Why mobile ethnography belongs in B2B research," Caroline Stovold detailed the many ways that in-the-moment research using cell phones can add potentially overlooked details and contexts to a B2B project, making respondents more than just data points and uncovering unspoken insights.

The outputs of mobile ethnography provide plenty of case studies to use to exemplify the research findings and bring the data to life. This is particularly important in B2B research as the audience may have little experience of a respondent's job or workplace. Threading together videos, photos and sound bites can produce a more engaging report, making it easier for the audience to empathize, resulting in more memorable results. This ultimately leads to research findings that drive action.

In addition to gathering in-the-moment data, mobile ethnography will also gather a lot of contextual data, i.e., events or circumstances that may not seem significant to the respondent but are meaningful to the researcher. This contextual data is again often something a respondent will not mention in a focus group; perhaps it just seems too obvious or unimportant but can be the extra nugget that the researcher is looking for. In a tradesperson example, the ethnography may reveal that the installation was done in a different sequence of events than the manufacturer originally intended. Often, contextual data can lead to innovation.

FMCG + B2B = A-OK

Matthew Oster, in his article "How B2B research methods can help FMCG companies," outlined the ways that B2B research can be of value to fast-moving consumer goods (FMCG) companies whose products are sold to or used in institutional or B2B markets. Rather than depending on the (often informal) types of internal research like conversations with sales team members, Oster argued companies need a comprehensive effort to find out how much they don't know about what they don't know.

In the absence of using outside market researchers, most FMCG companies have developed in-house techniques that are frequently incapable of meeting the difficulties of understanding market drivers in the B2B space: who is leading in that space, whether they may be other FMCG manufacturers, distributors, wholesalers or service providers; and whether their sales are successfully meeting the size of the opportunity in this space. Many FMCG companies are frankly even unaware that a blind spot exists in their knowledge of the B2B marketplace.

At the most fundamental level, research on the institutional end-users within a B2B environment has to start with a broader examination of the institutions themselves before a deeper dive on purchasing and consumption trends. As a result, such research typically involves a top-down analysis of the underlying components of these institutions (how many exist; what they look like and offer their customers; how they can be segmented; how many people

they serve, either in the form of employees, guests, visitors, etc.; how fast they're growing or declining, especially compared to other similar types of institutions). Research such as this relies on interviews with industry experts (trade associations and other industry groups, government statistical agencies, prominent end users) as well as official statistics, FOIA requests and demographic/macroeconomic analyses.

This structural approach is combined with bottom-up research focused on understanding the specific behavior of a particular channel. Sizing the opportunity for a particular product in the B2B marketplace comes in the form of

[research with] procurement and purchasing officers, service providers and distributors, with care to sample a range of facilities by size, type and needs (e.g., within channels like manufacturing, certain facilities require specially formulated products for services like cleaning and sanitation). Though this methodology doesn't change markedly depending on the institutional channel, country or product in question, the sampling size might change to reflect the level of integration in the industry, the amount of respondents who can credibly add insight and the comfort of industry professionals to respond to market research inquiries.

How to use laddering without annoying B2B respondents

Most marketers are finally getting wise to the role of emotions in B2B purchases and, by extension, researchers are also using various methods to dig deep with B2B respondents. Back in 2010 Bernadette DeLamar helped pave the way by offering tips on using laddering with B2B respondents to get at the emotional drivers of their purchases in her article "When using laddering in B2B research, target your probes effectively."

To meet the challenges posed by laddering in B2B studies, we need to adapt the process to meet the more complex situations posed by business respondents. Experience has led me to the following adaptations:

• I clue in respondents as to what we are doing as well as the actual goal of the interview process itself.
• I add an additional layer to the chain (a "rung" to the ladder) wherein attributes are linked to the organization/business itself.
• I adhere to a more rigorous structure than we might with consumers, to forestall impatience and annoyance among these busy respondents.

Even among consumers, a relentless series of "Why is that important?" probes can lead to frustration and a desire to say anything just to get the drilling to stop. I surmise that the probes that great moderators actually use are something on the order of their "trade secrets." After all, it is common advice to avoid "why" questions in research, given that the response is often "Why not?"

The trade secret for business respondents, then, is a rigorous application of the questioning structure, together with a series of very targeted probes. A questioning series might proceed along this structure:

Regarding (Attribute/Feature) X:

• What is the benefit of that attribute/feature to your business?
• And how does that benefit you, personally?
• And when you have that benefit in your life, what is the consequence of that for you (or, what is the upside of that for you; or, for what reason is that meaningful/important to you)?
• And when that happens/exists, how does that make you feel?

The goal is to elicit responses until the respondent reaches an emotional end state such as security or happiness or accomplishment or peace of mind. It is often useful to use the Maslow hierarchy of needs as a heuristic device for identifying such end states. And, because we are attempting to get the respondent to that last rung of the ladder, a response to "How does that make you feel?" on the order of "It makes me feel good" is not an acceptable endpoint. In this context, "good" needs refinement and definition through additional coaxing.

Applying the structure rigorously has proven highly successful among busy business professionals. Simply employing a series of seemingly directionless probes (e.g., Why is that important to you?) can leave respondents exasperated and uncooperative. Give them a structure, however, and they "get it." A few (perhaps two in 10) will complete laddering chains practically on their own without any probes. On the other hand, a different few (perhaps one in 10) will not get it at all and never be able to reach even an emotional consequence, much less a core value or motivation, which is, of course, why we conduct multiple interviews.

The value of understanding the value chain

Many B2B products have more than one customer. To be sure, some are more important than others, but using research to introduce your internal stakeholders to the various links in the value chain is a way to expand your purview while also identifying new potential markets, said Eric Whipkey in "Why you should care about what your client's consumers want."

The problem with the traditional B2B research mindset is that it assumes that your clients are your sole customers. Of course this is true but there are usually other consumers of interest, too. It is all about the value chain. Somewhere down the value chain is a consumer to whom your client sells its products or provides services. The trick to making consumer research relevant in a B2B world is ensuring that you explore your client's ultimate customer. It is business-to-consumer-for-business (B2C4B).

So how do we determine which link of the value chain upon which to concentrate? Like many things in life, the answer is often, it depends. A rule of thumb is to look at the first section of the chain, think about who is going to touch the product or service next or who directly benefits from it at the client site and ladder down from there. Sometimes there is only one link in the chain, like a CPG company – you create a product for a consumer. But that's not what we are discussing here. B2C research is very straightforward when it comes to the value chain. Let's take a manufacturing industry example:

Steel companies make steel for the automotive, construction, energy, manufacturing, pipe and tube and steel distribution industries. Who is the immediate client? There are many. But who is the ultimate client? How far down the chain do you go? It really depends upon what will resonate most with your client. For the automobile industry, it is NOT likely to be the end consumer (car buyer) but in construction, it could be the architect, the builder or even the homeowner picking out materials at Home Depot.

Builders want strong but flexible materials but homeowners will want reliable materials that will hold up for years under extreme stress (i.e., earthquakes, severe winds, etc.). While you can just ask your immediate client what sort of steel to make and still satisfy them in the short term, your goal is to add value for your client, improve revenues, grow your business and theirs and build your brand.

As a market researcher, the question is really whose opinion, perception or needs will be most influential in your client's steel choice? When your immediate client makes their decision, they are looking for some evidence that those down the value chain will pick their product over others. If you can show them that those consumers or certain segments of consumers are more likely to choose their product due to some inherent property of your steel, you have a pretty strong ROI story to tell them. To this end, you would do much better by striving to satisfy the ultimate client's needs and bringing your clients loyal advocates.

With B2C4B research, the goal is not to get consumer research to tell you about your client, directly. You need consumer research to understand what your client's customers need so that you can turn to them and tell them, "I know who your clients are and I know what you need to provide them." What's more, you can ensure that you can do it better than other providers. This way you come off looking like a very innovative company that really knows their business and what's still more, it would be true. In essence your consumer research becomes a key part if not the star of your sales pitch to current and potential clients.

So, what type of research would apply using this new frame of reference? Like a lot of things it is easier to discuss what will most likely not be as useful. Loyalty research like Net Promoter and advocacy research is not especially helpful, as your client's customers don't likely even know about your company. Neither will brand and brand positioning work about your company help you much. This could be explored with your client's brand or perhaps the positioning of your product type or industry.

Others that will not likely apply are obvious, like package testing, copy testing, etc. As mentioned earlier, the research should focus on the ultimate consumers' needs, attitudes and use patterns, perceptions of your client's brand and/or the types of products/services produced by your client(s). In addition, do not shy away from including your clients and potential ultimate consumers in co-creation sessions.

Even better, use your end-consumer insights to feed co-creation sessions with your clients. You will be surprised by your clients' positive reaction and the role that you and your company can play in the strategy and deployment activities of your clients. This simple change of reference makes consumer research every bit as important in the B2B world as it is in the CPG world. It just needs to be applied from a slightly different point of view.

Is there a topic that you'd like to see featured here? Reach out to Quirk's Editor Joe Rydholm at joe@quirks.com.

With B2B data presentations, it takes time to save time

To really deliver useful information and analysis, B2B researchers need their reports to make outcomes and actions clear and understandable to their end clients, wrote Kieron Mathews in "Successful B2B research requires insight generation, not just data gathering."

Generating insight does mean more data, which does, of course, need to be shared with the client. However, this does not need to be shared during the initial debrief. Sitting through a quantitative research debrief can result in clients drowning in data and struggling to identify the key findings of the study – the insight. Known throughout the business as "death by bar chart," this has been one of the most common by-products of the industry's transition from data production to insight generation. So how do you cut down on the number of slides, save a few trees and make sure there is more insight and less data in a research debrief?

The trick is to be very focused on what bits of the analysis actually make it into the debrief presentation. The best insights are clean and simple, with distinguishable business actions that can be implemented. The time spent with a client is often limited, so researchers need to keep their presentations short to allow for an extended question-and-answer session. This gives those attending a chance to discuss the findings of interest to them and extract the required knowledge from the researcher. To achieve debrief success, researchers should:

• Start thinking about the presentation at the beginning of the research project. This gives the team a structure to work toward and gets them pondering how certain elements of their findings may eventually be communicated to their audiences.

• Invest time. It takes a lot longer to write a short presentation. An organization must develop a culture that allows researchers time to conclude a project and create a powerful presentation and not rush the vital final stages of the activity.

• Ask "So what?" This is a very effective way of culling redundant slides. Ideally this is undertaken by a colleague who is not close to the data. If the researcher can't answer this simple question there are two choices: go back and do further analysis or delete the slide.

• Think visually. Making a presentation engaging and easy to understand will demonstrate to a client that the company has gone that extra step to produce an informative document and will also allow them to share the presentation and communicate the key findings with others in the company. ●

Innovation through academic partnership: How a research firm transformed with zero budget

| By Patrick Johnston

abstract

One company's successful collaboration with business school students offers a blueprint for how small businesses can tap into academic expertise to drive innovation without breaking the bank.

In the ever-changing marketing research industry, the company I founded, Vista Research, faced significant challenges. Traditional data processing services were no longer sufficient to meet the demands of a data-driven market, necessitating a strategic pivot to remain competitive. With limited resources, Vista found a transformative solution: an experiential learning partnership with the Gies College of Business at the University of Illinois (Urbana-Champaign).

The collaboration began when we connected with professor Ashish Khandelwal to discuss the business challenges Vista faced. From this discussion, the project scope was defined, focusing on automating workflows, leveraging machine learning and exploring innovative services.

A team was formed, led by Aishwarya Chourasia, a recent graduate of the Master of Science in Technology Management (MSTM) program at Gies, including students from the MSTM and Master of Science in Business Analytics (MSBA) programs. Tasks were assigned by Chourasia in consultation with Khandelwal, aligning with the students' backgrounds and interests.

The workflow was structured around regular updates and guidance:

Weekly meetings: The team shared progress and updates with us, ensuring alignment with our business goals.

Consultations with faculty: Professor Khandelwal provided technical guidance on methods and technology.

Strategic reviews: Every three to four weeks, professor Khandelwal and I met to assess overall progress and adjust priorities.

This iterative process was informed by industry trends, Vista's business focus and its priorities. We also gathered insights from our network of experienced professionals and shared these findings with the university team. Feedback from industry leaders and clients helped shape the products and services that were developed.

Harnessing diverse expertise

The MSTM program at Gies prepares students for leadership roles in technology-driven business environments, while the MSBA program equips graduates with a blend of business acumen and data science expertise. The students' resourcefulness, combined with their willingness to quickly learn required skills, allowed them to: develop automated workflows using open-source tools like Python, Streamlit and Shiny; implement machine learning frameworks like scikit-learn for predictive modeling; and design innovative services under the guidance of professor Khandelwal.

"We are proud of our students' dedication and commitment to their learning and their willingness to create value for client partners," he says. "We deeply appreciate the trust and opportunity provided by our clients, which allow our students to tackle real-world problems and gain invaluable experience."

This year, Khandelwal oversees over 25 project teams as part of his Business Practicum course, working with clients across sectors such as health care, retail, engineering and edutech. With an MBA in marketing research and a Ph.D. in marketing, he has been teaching data science and analytics at Gies for over five years.

Mutual benefits and practical outcomes

The partnership has been mutually beneficial:

For Vista: The team's efforts on almost zero budget have allowed Vista to modernize its offerings using open-source tools. The structured collaboration has helped Vista stay informed about industry trends and make strategic decisions with input from its network and the Gies team.

For students: Real-world problem-solving has honed their skills and provided practical experience, preparing them for careers in data science, analytics and technology management.

The collaboration with the Gies College has been a game-changer for us. The students' energy and expertise, coupled with professor Khandelwal's guidance, have enabled Vista to explore new opportunities and develop scalable solutions without significant financial investment.

This partnership is not unique; many other organizations have found similar collaborations highly valuable. This model works exceptionally well for small businesses, start-ups and non-profits, which often face resource constraints and are likely to be the biggest beneficiaries of such collaborations. ①

Patrick Johnston is president of Vista Research. He can be reached at patj@vista-rs.com. Ashish Khandelwal can be reached at ashishk@illinois.edu at the Gies College of Business (University of Illinois, Urbana-Champaign).
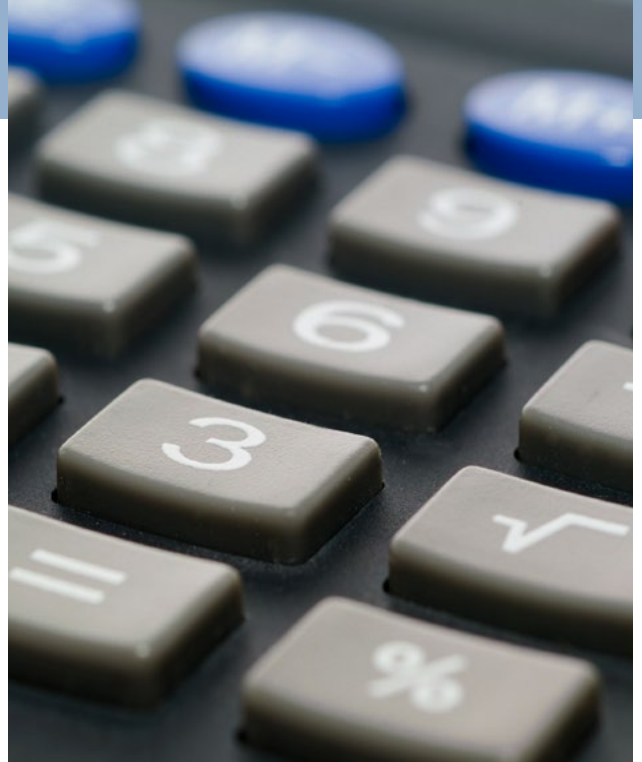
Q

Choice models for patient chart audits

| By Keith Chrzan

abstract

Applying three kinds of models – polytomous multinomial logit, classification trees and random forests – to chart audit data and understand and predict physicians' therapy choices.

I
n the November/December 2024 edition of Quirk's, Lynn Welsh and Tamara Fraley describe the use of patient chart audits to understand physicians' prescribing behavior ("From recollection to reality: Understanding prescribing trends through chart audits"). They note that using chart audits enables us to see actual behaviors, not just behaviors recalled and reported in a typical survey research environment. Patient chart audits thus provide better data as they use recorded than recalled behaviors.

Let's consider this an extension of that article, because below I'll describe how we can apply choice modeling techniques to understand and predict physicians' therapy choices. Alternatively, you could view this as a companion piece to my earlier article on situational choice experiments, SCEs, because the choice modeling we do with chart audits can resemble what we do in those experiments (see "Situational choice experiments for marketing research," Quirk's, March/April 2024).

We'll start by introducing three kinds of models we often use with chart audit data. Then we'll illustrate their outputs using results from a disguised case study conducted recently for a client.

Background

Not all choice models are experiments involving researcher-designed choice scenarios like choice-based conjoint. Dan McFadden published the first multinomial logit (MNL) choice model in the early 1970s as part of a study analyzing the choices commuters made among real-world travel options (McFadden 1974). One can build models to explain all manner of observed or self-reported choices. In fact, the first use of a choice experiment, which creates hypothetical choice scenarios for respondents to choose among, wasn't published until the early 1980s, a decade after McFadden invented multinomial logit. For those familiar with the academic literature, choice models built from experimentally designed stimuli are called stated preference (SP) models while those built from observed or reported actual choices we refer to as revealed preference (RP) models.

Choice models built from chart audits thus qualify as RP models, because they measure actual choices made by real decision makers in their natural environments. In a patient chart audit, we collect the therapies actually prescribed by physicians for particular patients and we model those therapy choices as a function of patient and physician characteristics. Depending on the details of the chart audit, there are three modeling approaches we use most often.

Polytomous multinomial logit (P-MNL) – a classic statistical modeling approach

P-MNL is a special case of the multinomial logit choice model, different from the "conditional" multinomial logit used in conjoint and other choice experiments (Theil 1969, Hoffman and Duncan 1988). In P-MNL, predictor variables are invariant across choice alternatives – in the case of patient chart audits they describe the patient or the physician, not the therapies. P-MNL produces a set of regression-like coefficients that quantify the impact of each patient or physician variable on therapy choice. These coefficients also enable us to build a simulator, so that we can predict physicians' therapy choices for new patients not included in the chart audit. The case study below contains an example of P-MNL model output.

Classification tree – a visual, intuitive alternative

A classification tree is a decision tree which predicts the outcome of a categorical variable (Breiman, Friedman, Olshen and Stone 1984). In patient audit studies, this dependent variable is usually the physician's prescribed or recommended therapy and the candidate explanatory variables can be any of the other variables collected in the patient audit that describe the physician, the patient or the disease. Starting with the entire set of candidate explanatory variables, the analysis looks at each variable in turn to see which best differentiates on the basis of therapy choices (think perhaps of a chi-square test where the variable with the most significant chi-squared statistic is selected, though the analysis

Figure 1
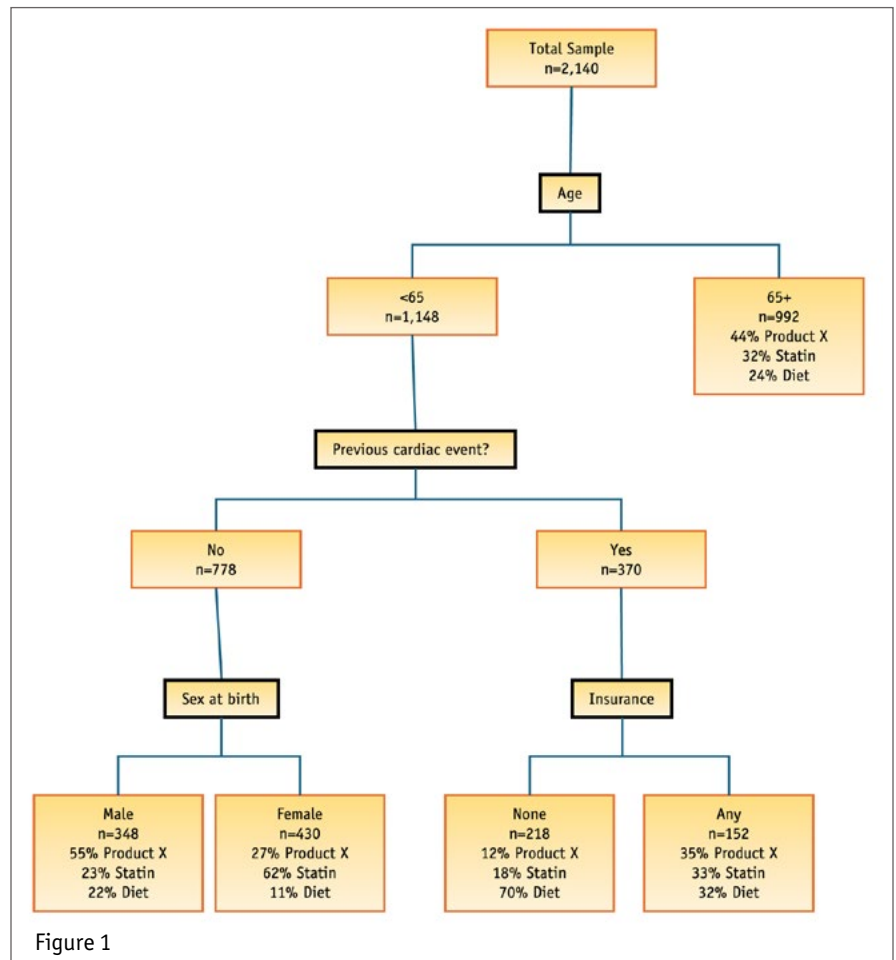
is actually a bit more complex than that). The tree uses that single most discriminating variable to split the set of patient charts into two groups. The analysis then moves on to each of these two groups in turn and repeats the splitting process. It continues to repeat this process again and again, once for each resulting subgroup: find the most significant splitting variable, split into two maximally different groups, repeat. Eventually the analysis reaches a stopping point (think of this as the point where no further significant differences result, but again the analysis is a little more complex than that). What finally results is an inverted tree which starts with the entire sample of patient charts and ends with many different branches, each ending in a node defined by different physician choices and each with potentially very different results in terms of therapy shares. For example, a classification tree might look something like Figure 1.

Notice that the tree provides a structure to the decision hierarchy clients sometimes request – it appears that the physicians first considered their patient's age in their decision process, before moving on to cardiac history, patient's sex at birth and their insurance coverage.

This process of repeated splits of the sample, a process called recursive partitioning, makes classification tree models sample size-intensive. We can do them with a patient chart audit because even though we may only have a few hundred respondents, each respondent gives us data from a few different patient charts. The case study below shows an example of the classification tree analysis.

Random forest – the power of machine learning with many trees

When you first hear about random forests, they may strike you as a method you wouldn't expect to work well. Extensive experience has shown that they work extremely well as predictive

models, however, so just bear with me as I describe them. As the name suggests, a random forest isn't a single tree – instead, it builds a large number of trees or a forest (Breiman 2001). As the name also suggests, there is a random element to their construction – actually two random elements. First, only a randomly selected two-thirds or so of the cases contribute to the construction of a given tree, with one-third held out to test the predictive quality of the tree. The second random component involves each branch of each tree, where we consider only a random subset of the predictor variables as bases for a split. These two randomizing elements are said to "decorrelate" the tree. This can be valuable because in the classification tree analysis described earlier, if two variables are highly correlated, it's possible for one of them to enter the tree and for the other to be left out, even though both of them might be important – the random forest would identify both of them as being important. After growing a forest of 500 or 1,000 trees, we look at how each tree would classify each of our physician audits and we give each tree a vote; a majority vote among the trees is our prediction for any particular patient chart. Summing the votes across charts gives us predicted shares. We assign variable importance by quantifying how much our prediction accuracy falls off when trees include a given variable compared to when they do not.

While we can use random forests for predicting, doing so requires running a new set of observations through the existing forest of trees and then recording each tree's vote. This is something we can do easily enough in the RF program but it would be very messy to build into Excel as the client wanted.

When we have experimentally designed patients, as in the situational choice experiments mentioned earlier, the P-MNL and the classification tree models tend to work beautifully. When we don't have experimental control – that is, when predictor variables may be correlated (such as for patient chart

studies involving real patients) – the random forest model may work better.

A case study

This case study shows how we used the three methods above to understand physicians' observed choices among therapies A, B and C, for patients suffering from a specific disease and based on nearly 50 variables collected in a patient chart study. These were actual, not hypothetical, choices and no experimental design forced the predictors to be uncorrelated. Because of the proprietary nature of the study, the results below use disguised variable names and model coefficients.

Our client wanted to understand how physicians made decisions about what therapy to prescribe to a particular class of patients suffering from a particular disease. The client also wanted a simulator so that they could see how changes to physician and patient variables affected treatment decisions and they wanted a way for the management team to visualize the results.

The survey collected eight patient charts from each of 250 physicians, so we had a total of 2,000 therapy decisions with which to build our models. In addition to a dozen or so variables about the physician (years in practice, subspecialty and some disease-specific attitudes) in the main questionnaire, the patient charts included another 30+ variables related to the patient – demographics, concomitant conditions, disease-specific information ("diseasographics"), insurance coverage, disease-relevant behaviors and so on.

After discussing the relative merits of the P-MNL model, a random forest model and a classification tree, the client opted against the random forest analysis, because they were interested in a predictive model they could build into an Excel workbook, which is difficult for RF. The client decided that the classification tree and the P-MNL would best suit their needs and both analyses ended up predicting therapy choices well.

Classification tree. The tree analysis in this study produced a branchier tree than the example above: 13 binary splits

that resulted in 14 final nodes based on different values of five of the variables (all five came from the patient chart data and none measured physician characteristics). Because the potential predictor variables had different numbers of levels, we used a particular classification tree method called conditional inference, which doesn't favor splits on variables with more levels, as some other classification tree models may (Hothorn, Hornik and Zeileis 2006).

The tree was richly differentiating, as the percentages of Therapy A ranged from 14% to 70% across the 14 nodes. Those for Therapy B ranged from 21% to 58% and those for Therapy C ranged between a low of 8% and a high of 40%. The tree also provided a nice visualization of how the variables interacted with one another to influence therapy decisions.

Also note that, with 14 ending paths, the model requires a healthy amount of sample to work with – eight charts from each of 250 physicians in this case gave us a sample size of 2,000.

Polytomous logit choice model. The P-MNL choice model ended up with the same five variables as significant predictors (not something that was guaranteed to happen but something that one might expect). The utility model in a P-MNL analysis has one vector (column) for each therapy option the physicians might prescribe (one for each of therapies A, B and C in this case). Each column has a unique set of coefficients (utilities) for each level of each predictor variable – this is because the model uses patient and physician characteristics to predict choices, not the characteristics of the patients. A model using product characteristics to make the prediction would have a single column of utilities, one for each level of each attribute, like in a typical conjoint experiment. Another way to think of the difference is that in P-MNL "each explanatory variable has a different effect on each outcome" (Long 1977, p. 178). Please refer to the previously cited article on situational choice experiments in Quirk's, March/April 2024, to learn more about the structure of the P-MNL model. This utility model resulted for

Utilities

Attribute	Level	Therapy A	Therapy B	Therapy C
Constant		-4.15	-0.82	0
X1	1	0.78	-0.95	0
	2	0.32	-0.54	0
	3	0	0	0
X8	1	4.13	1.71	0
	2	3.01	1.42	0
	3	2.28	1.18	0
	4	2.07	1.11	0
	5	1.22	0.67	0
	6	0	0	0
X12	1	0.96	-0.29	0
	2	0.20	-0.21	0
	3	0	0	0
X31	1	0.57	-0.36	0
	2	0.09	-0.31	0
	3	0	0	0
X44	1	0.62	0.23	0
	2	0	0	0

Figure 2

the therapy choices captured in our chart audit (Figure 2).

For example, when $X_1=1$ the utility of Therapy A increases by 0.78, the utility of Therapy B decreases by 0.95 while the utility of the reference level, Therapy C, remains unchanged. Share prediction follows the same logit choice rule used in conjoint studies, allowing us to report model results in user-friendly Excel simulators.

Simulation

The two models had similar levels of predictive accuracy but their specific predictions varied slightly across scenarios. For this reason, the simulator we built gave the client three options. They could: predict from the classification tree; predict from the P-MNL; or predict from an ensemble that averaged the predictions of the two models.

The simulator was built in Excel and the user interface looked just like any other conjoint/choice simulator,

allowing the user to input patient and physician characteristics, and it displayed the resulting choice shares. The models operated behind the scenes (on hidden sheets).

Random forest analysis

As noted, the client opted against the random forest model. However, we include the model here for purposes of the case study. As described above, the random forest analysis produces a set of importances for each variable (Figure 3). We usually scale these to sum to 100% for ease of interpretation.

Again, the same five variables are the most important, albeit in a slightly different order than might have been suggested by the classification tree or the P-MNL model. As it turned out, the predictor variables were not correlated enough with each other for us to see a markedly different result from the random forest than from the other analyses, though this isn't something we could have guaranteed would happen ahead of time. Luckily this analysis does suggest that the tree and P-MNL analyses reported to the client weren't missing any important variables through the bad luck of their being correlated with

other predictors. This suggests another benefit of the random forest analysis: it can serve as something of a safety net. Had the analysis identified important variables that were not included in the P-MNL and classification tree models, we could have alerted the client to the fact that those models suffered from some multicollinearity and to interpret them cautiously.

The client ended up with a useful visualization of the decision process as well as a flexible simulator in Excel that allowed them to make therapy share predictions for specific patient profiles.

Add value

We thus have a variety of choice modeling tools we can apply to patient audit data. The choice models add value to the audit data by explaining the choices observed in the audits. This powerful combination of capturing and modeling actual choice behavior makes chart audits a powerful tool in the pharmaceutical marketer's toolbox. Moreover, the RP modeling methods described here also apply to cases outside of pharmaceutical markets where we are able to collect data about choices and choosers. ⓘ

Keith Chrzan is senior vice president of analytics at Sawtooth Software Inc. He can be reached at keith@sawtoothsoftware.com.

REFERENCES
Breiman, L. (2001) "Random forests," Machine Learning, 45: 5-32.

Breiman, L., J.H. Friedman, R.A. Olshen, and C.J. Stone (1984) "Classification and Regression Trees." New York: Chapman and Hall.

Hothorn, T., K., Hornik and A. Zeileis (2006) "Unbiased recursive partitioning: A conditional inference framework," Journal of Computational and Graphical Statistics, 15: 651-674.

Hoffman, S.D. and G.J. Duncan, "Multinomial and conditional logit discrete-choice models in demography," Demography, 25(3): 415-427.

Long, J.S. (1997) "Regression Models for Categorical and Limited Dependent Variables." Thousand Oaks: Sage.

McFadden, D. (1974) "Conditional logit analysis of qualitative choice behavior." In: P. Zarembka (ed.) "Frontiers in Econometrics." New York: Academic Press, 105-142.

Theil, H. (1969) "A multinomial extension of the linear logit model." International Economic Review, 10(3): 251-259.

Attribute	Importance
X8	18
X1	13
X12	10
X44	8
X31	6
X50	3
. . .	. . .
X2	0.2

Figure 3

If it looks too good to be true...

AI-FABRICATED STUDIES:

A wake-up call for B2B research integrity

Modern AI tools make it possible to create convincing fake research participants, simulate interviews and generate polished reports that appear authentic but contain no real data. Research buyers must recognize warning signs like refusal to share raw data, unnaturally perfect recordings and vague methodologies to avoid making costly business decisions based on fabricated insights.

By Raeann Bilow and Sean Campbell

Generative AI is transforming the way we conduct research. From streamlining data analysis to drafting insights-rich reports in record time, it's a game-changer for anyone working to extract meaning from complex information. At Cascade Insights, we've embraced Gen AI to enhance – not replace – human expertise, using it to refine participant targeting, model outcomes and deliver faster, smarter results for our clients.

But as with any revolutionary tool, its power cuts both ways. Just as the internet enabled the spread of knowledge and misinformation, AI's potential can be harnessed for good – or for decep-

tion. Imagine a world where an entire B2B research study – participants, interviews, insights and final deliverables – is completely fabricated by AI.

This isn't science fiction; it's a near-future possibility. So let's project what's possible – not to alarm but to ignite a conversation about the ethical boundaries and safeguards we must build. What happens when research becomes indistinguishable from fiction?

How it's possible to fake an entire study

AI's ability to fabricate every element of a B2B research study is disturbingly advanced. With the tools already avail-

able, it's possible to create fake participants, simulate convincing interviews and generate entire studies from start to finish. While research buyers can watch for red flags to identify vendors who might deliver fabricated results, it's crucial to first understand how this process works. Here's how it all comes together:

STEP 1: *Generating fake participants*
AI can build incredibly detailed profiles for fake participants. Imagine "Jane Doe," a 32-year-old urban planner from Seattle who transitioned into sustainability after volunteering for a green building project. Her backstory includes a passion for eco-friendly initiatives, a career switch from architecture and a deep understanding of urban sustainability challenges.

A human could first generate a LinkedIn profile highlighting Jane's career journey, endorsements and connections or create social media accounts with posts and interactions aligned with her fabricated backstory. From there, AI could streamline much of the ongoing content creation and customization. These profiles are so meticulously crafted – with detailed

demographics, interests and expertise – that they feel entirely authentic.

To further enhance this illusion, AI could assist in building a complete online presence for Jane, extending beyond LinkedIn to include other platforms, blogs or even professional networks, creating a cohesive and convincing digital footprint.

Looking ahead, advancements like Anthropic's Claude's "computer use" API functionality and the rise of autonomous agents in 2025 could make this process even more automated. These tools could potentially handle tasks en masse, from generating profiles to populating them with realistic interactions, creating a sophisticated illusion of authenticity with minimal human involvement.

Creating this added layer of digital footprints gives an extra sense of legitimacy, making it nearly impossible to distinguish between a fabricated participant and a real one. The danger? The sheer believability of these participants lends legitimacy to a study that doesn't actually involve real people.

> *In the future, the simple fact that an audio recording exists is no longer proof that an interview actually occurred between two human beings. This added realism, whether derived from text or starting as audio, makes it even harder to detect that the interviews were entirely fabricated.*

STEP 2: *Simulating realistic interviews*
Once the participants are created, AI can take over both sides of the conversation, generating entire interviews with no human involvement. Advanced language models like ChatGPT or Gemini can serve as the "interviewer," asking tailored questions. Simultaneously, the fabricated participant, powered by the same or similar AI models, provides responses.

For example, the AI interviewer might ask, "What inspired your shift toward sustainable development?" The AI-generated participant, Jane Doe, might respond:

"I volunteered on a green building project and it really opened my eyes to the environmental impact of urban spaces. After that, I knew I needed to make a change."

The exchange flows seamlessly, with natural pauses, conversational tones and personalized responses that align with the participant's fabricated expertise. The danger here is not just in the responses but in how convincingly the AI interviewer and participant can create the illusion of depth and authentic-

ity. This fully automated process erases the human element entirely, making it almost impossible to detect that the interaction never actually occurred.

STEP 3: *Creating audio evidence of interviews*

Interview transcripts can then be turned into audio files, with each participant assigned a unique, human-like voice. For example, Jane might have a calm, reflective tone, while another participant could sound assertive and energetic. Background noises – like coffee shop chatter or keyboard clicks – can be layered in to make the recordings feel as though they were captured in real-world settings.

Alternatively, starting from audio, AI-generated voices could be built off of transcripts, ensuring the fabricated content aligns perfectly with the study's focus. This flexibility makes it easier to create convincing outputs, regardless of where the process begins. Including developing a mixed set of voices and profiles for these "audio recordings."

[When using deepfake technology for video], the combination of hyperrealistic visuals and synchronized audio makes it increasingly difficult to distinguish real participants from fabricated ones, underscoring the critical need for robust ethical oversight in research practices.

In the future, the simple fact that an audio recording exists is no longer proof that an interview actually occurred between two human beings. This added realism, whether derived from text or starting as audio, makes it even harder to detect that the interviews were entirely fabricated.

Tools like ElevenLabs can generate lifelike voice outputs for audio, while frameworks like Hugging Face Transformers handle the generation of sophisticated, natural-sounding dialogue. These technologies have legitimate applications, such as creating simulations for training researchers, developing conversational AI for customer service or testing study designs before involving real participants.

However, when misused, these same tools can fabricate entire datasets of interviews, convincingly deceiving stakeholders into believing the insights are derived from real human interactions.

STEP 4: *Using deepfake technology for video*

Why stop at audio when video can add an even more convincing layer of deception? Deepfake technology can create videos of fabricated participants speaking directly to the camera. AI-driven tools like DeepFaceLab or Synthesia can synchronize lip movements perfectly with AI-generated audio while adding body language that reflects the fabricated participant's personality – thoughtful head nods, subtle hand gestures and authentic facial expressions.

The persuasive power of video is unparalleled. Seeing someone "speak" about their experiences creates a visceral connection, making viewers believe in the participant's existence and insights.

While tools like Synthesia can be used for legitimate purposes – such as creating training videos, producing inclusive content with multilingual presenters or simulating conversations for education and research – they also have the potential for misuse. The same tools can fabricate convincing deepfake participants for research studies, deceiving stakeholders into trusting inauthentic insights. They could further be exploited to spread misinformation or influence opinions with entirely fabricated "evidence."

The combination of hyperrealistic visuals and synchronized audio makes it increasingly difficult to distinguish real participants from fabricated ones, underscoring the critical need for robust ethical oversight in research practices.

STEP 5: *AI-driven data analysis*

Once the fabricated interviews are complete, AI can handle the entire data analysis process – without any human intervention. Advanced models can process transcripts, identify trends and generate insights that seem entirely plausible. For instance, AI might produce findings like: "70% of participants in their 30s expressed optimism about AI-driven sustainability solutions."

These insights align with real-world trends, making them appear credible. The issue isn't that AI performs the analysis – AI-driven analysis can be a valuable tool. The problem arises when AI does all the analysis, leaving no human in the loop to validate or critically assess the results. In the wrong hands, this lack of oversight can lead to the production of entirely synthetic yet convincing conclusions, which may go unchallenged by stakeholders relying on the study.

Emerging capabilities such as Claude's computer use API functionality introduce even greater potential for fully autonomous workflows. These tools allow AI systems to act as agents, automating complex processes like accessing and organizing files, running statistical models and generating polished deliverables. When combined with agent frameworks such as LangChain or AutoGPT, AI can coordinate multiple tasks – handling data extraction, analysis and report-generation seamlessly.

While these tools can enhance efficiency and productivity, they also make it easier to orchestrate a fully autonomous, end-to-end fabrication of a study. For instance, an AI agent could: analyze fabricated data with minimal instruction; generate visualizations, infographics and narrative interpretations; and package everything into a professional-looking report, ready for delivery.

When humans are removed entirely from the loop, the outputs – no matter how sophisticated – lack critical judgment, ethical consideration and a layer

of accountability. Without a human reviewer, errors or intentional manipulations in the data go unchecked. Furthermore, the seamlessness of tools like Claude's API and agents makes the process faster and harder to detect, raising the stakes for maintaining rigorous oversight.

The danger is clear: while these tools are invaluable for streamlining workflows, they must be used responsibly and with human involvement at every critical juncture to ensure the integrity of the research. The line between innovation and deception depends not on the technology itself but on the ethics of those who wield it.

STEP 6: *Producing a polished report*
AI tools like ChatGPT or Claude can compile fabricated data into a professional-looking report, drafting sections such as methodology, results and discussion. For example, the methodology might falsely claim "semi-structured interviews were conducted with 50 professionals," while fabricated results align perfectly with industry trends.

Visualization tools like Tableau, Power BI or Beautiful.ai can transform the data into polished graphs and infographics. These outputs can then be fed into presentation tools like Tome or Canva's AI features to generate client-ready slides. And, again, emerging AI functionalities such as Claude's computer use API allow for seamless automation, summarizing findings and designing presentations without human input.

The result is a deliverable that appears authentic, complete with visuals, data-driven conclusions and a polished narrative. While these tools can enhance legitimate workflows, when used unethically, they enable fully autonomous, fabricated studies that are nearly impossible to detect. This underscores the critical need for human oversight and ethical safeguards at every stage.

Red flags for research buyers
How can B2B research buyers ensure the study they commission is legitimate? Let's explore a scenario that highlights the pitfalls and warning signs.

Imagine a decision-maker tasked with commissioning a research study on how CIOs are adopting AI in manufacturing. They solicit proposals from several firms, aiming to find the best value for their budget.

One firm provides a traditional, well-structured proposal with detailed cost breakdowns, a clear timeline and a rigorous plan for recruiting real participants and conducting authentic interviews. Another firm offers a surprisingly low-cost bid, promising faster results with "innovative methodologies."

Drawn to the lower price, the buyer opts for the cheaper option. At first, everything seems perfect: participant profiles appear detailed and aligned with research goals; interview quotes seem thoughtful and insightful; and the final report is polished, with professional visuals and data.

However, as the project progresses, subtle issues arise.
- **Lack of transparency:** The vendor refuses to allow the buyer to observe interviews or focus groups, often citing logistical challenges or privacy concerns. This lack of visibility into the research process leaves buyers in the dark about how the study is conducted and raises serious doubts about its authenticity.
- **Unnaturally perfect recordings:** Audio provided by the vendor may sound overly polished, with no interruptions, filler words or natural conversational flow. This unnatural perfection can indicate that the recordings are artificially generated, undermining trust in the study's validity.
- **Vague methodological explanations:** When questioned about their methods, the vendor provides vague or evasive answers, failing to clarify critical aspects of participant recruitment, data collection or analysis. This lack of detail erodes confidence and suggests the vendor may be hiding unethical practices.
- **Refusal to share raw data:** Vendors may use "privacy concerns" as an excuse to avoid sharing raw data or recordings. Or in some cases, they might share fabricated MP3 recordings that seem legitimate but are entirely fake. This false transparency makes it nearly impossible to verify the authenticity of the research without robust validation mechanisms in place.

The fallout
Eventually, the truth comes to light: the study was entirely fabricated using AI. Participant profiles, interview tran-

When humans are removed entirely from the loop, the outputs – no matter how sophisticated – lack critical judgment, ethical consideration and a layer of accountability. Without a human reviewer, errors or intentional manipulations in the data go unchecked.

scripts and findings were all synthetic. The consequences for the buyer are significant:

- **Erosion of stakeholder trust:** Stakeholders lose confidence in the buyer's judgment, questioning their ability to commission reliable research and make sound decisions. This lack of trust can hinder future initiatives and damage internal and external relationships.
- **Flawed business decisions:** Strategies and investments based on false data result in costly mistakes.

> While AI is a powerful and transformative tool, it must remain just that – a tool. The decisions about what AI should and shouldn't do will always rest with us and one thing it should never replace is the direct engagement with actual human beings. Companies build products and services for humans, not AI. The insights that drive these decisions must come from the people who are impacted by them, ensuring the research remains grounded in reality, empathy and genuine human experience.

Whether launching a new product, entering a market or reallocating resources, these decisions can lead to wasted budgets, missed opportunities and long-term setbacks.

- **Reputational damage:** If findings from the study are later proven false by other credible research, the buyer's credibility and that of their organization could suffer. This damage can extend to partnerships, customer trust and industry standing, with lasting implications for the organization's reputation.

The initial cost savings quickly turn into a significant liability, underscoring the dangers of prioritizing budget over research integrity. Buyers must stay vigilant, recognize red flags early and choose vendors who prioritize transparency and authenticity to avoid these costly mistakes.

Why the risk isn't worth it for vendors

For market research firms, leveraging AI responsibly can enhance efficiency and insights but cutting ethical corners with AI shortcuts comes with significant risks. Fabricating a study doesn't just lead to a failed project, it can result in legal and financial ruin, destroy trust with clients and create a ripple effect of skepticism that damages the entire industry.

While AI is a powerful and transformative tool, it must remain just that – a tool. The decisions about what AI should and shouldn't do will always rest with us and one thing it should never replace is the direct engagement with actual human beings. Companies build products and services for humans, not AI. The insights that drive these decisions must come from the people who are impacted by them, ensuring the research remains grounded in reality, empathy and genuine human experience.

The short-term appeal of shortcuts is far outweighed by the long-term consequences of eroding credibility. Consider two contrasting approaches:

Vendor A: Conducts research the traditional way – recruiting real participants, conducting authentic interviews and performing rigorous analysis. This approach takes more time and resourc-

es but guarantees transparency and trustworthiness.

Vendor B: Opts for the shortcut, fabricating participants, interviews and insights using AI. The process is faster, cheaper and superficially indistinguishable from genuine research.

While Vendor B's approach might initially seem like an innovative way to save costs, the moment their deception is uncovered, the consequences are catastrophic:

Tarnished reputation: Trust is the foundation of the research industry and faking a study destroys it. Once exposed, the firm faces blacklisting from clients, damaging word-of-mouth, and an irreparable association with fraud. Rebuilding credibility becomes nearly impossible.

Legal ramifications: Fabricating a study risks breach-of-contract lawsuits, regulatory scrutiny and financial penalties. In industries like health care or finance, where research informs critical decisions, the fallout can lead to legal battles and potential bankruptcy.

Industry-wide consequences: The damage extends beyond the offending firm, undermining trust across the entire industry. Clients may grow skeptical of all vendors, slowing decision-making and devaluing market research as a tool. Legitimate firms are forced to work harder to prove their authenticity, increasing costs and eroding efficiency.

Ethical and internal fallout: Internally, the exposure of a fabricated study can destroy morale and trust within the vendor's team. Employees who were unaware of the deception may feel betrayed, leading to resignations and difficulty retaining top talent. For leadership, the scandal can result in public disgrace, resignation demands and lasting damage to their careers.

Ensuring authenticity

If AI can be used to fabricate entire studies, how do we protect the integrity of research? Here are some strategies to consider:

1. Establish transparency standards

Research firms should implement clear policies stating that no human participants will be faked under any circumstances. This commitment must be supported by transparency about how and where AI is used in their processes. For example, firms should disclose whether AI assists in participant selection, data analysis or report generation and clarify its specific role in enhancing the research process.

To ensure compliance, both vendors and clients should implement logical and procedural checks. Vendors should maintain detailed records of participant recruitment, provide access to raw data or metadata and offer tools for live observation of interviews or focus groups. These practices demonstrate the integrity of their research.

Equally, decision-makers commissioning studies must demand this transparency. They should ask questions about participant sourcing, data collection methods and the extent to which AI tools were utilized. A standardized disclosure policy across the industry could reduce ambiguity and rebuild trust.

2. Implement verification protocols

Research providers should invite their clients into the process wherever possible. Allowing access to live observation of in-depth interviews (IDIs) or focus groups provides assurance of participant authenticity.

If live access isn't feasible, firms should supply raw data, audio recordings and metadata for independent audits. Independent verification systems or third-party validators could confirm the validity of participants and ensure data aligns with reported findings.

3. Educate research buyers

The buyers of research services need the tools to identify some of the red flags identified above, such as: methodologies that are overly vague or poorly defined; refusals to share raw data or offer transparency into the research process; and results that seem too polished or perfectly aligned with expectations.

By fostering a culture of critical thinking and informed decision-making, research buyers can become active participants in maintaining the integrity of their projects.

4. Build on ethical guidelines

Ethical frameworks for the responsible use of AI in research already exist and provide a strong foundation. For instance, the European Commission's Ethics Guidelines for Trustworthy AI outline principles such as transparency, accountability and fairness, offering insights into the ethical application of AI. Similarly, the Canadian Research Insights Council has established Guiding Principles for AI Use in Market Research for responsible practices tailored to the research context.

However, gaps remain. While these guidelines establish broad principles, the research industry still needs more specific standards tailored to combating risks like fully fabricated studies. These could include: prohibitions against faking data entirely; clear accountability measures for vendors using AI in ways that compromise research integrity; practical protocols for implementing transparency and verification measures across all phases of the research process.

Expanding on existing guidelines to address these emerging risks would help to maintain trust in the research ecosystem.

Safeguarding B2B research in an AI-driven world

As AI capabilities grow, so does the temptation to use them irresponsibly. However, the research industry's credibility hinges on trust – trust that the data is real, the insights are valid and the process is ethical. By adopting transparency standards, implementing verification protocols and adhering to ethical guidelines, we can harness the power of AI without compromising the integrity of our work.

As William Gibson aptly said, "The future is already here – it's just not evenly distributed." This reminds us that while AI offers immense potential, its use in research must be guided by equitable and ethical principles. We are at the forefront of shaping how AI integrates into the industry, ensuring that it serves humanity rather than undermines it.

The question isn't whether AI should be used in research – it should. Instead, we must focus on ensuring its use aligns with the principles that uphold our industry and benefit the people behind the data.

We'd love to hear your thoughts: How do you see AI shaping the future of B2B research? E-mail us or connect with us on LinkedIn. Let's start a conversation about the responsible use of AI and build a collective vision for its role in the industry. ⓞ

Raeann Bilow is marketing strategist at Cascade Insights. She can be reached at raeann@cascadeinsights.com. Sean Campbell is CEO of Cascade Insights. He can be reached at sean@cascadeinsights.com.

> *The question isn't whether AI should be used in research – it should. Instead, we must focus on ensuring its use aligns with the principles that uphold our industry and benefit the people behind the data.*

••• entertainment research

Trouble getting a signal

Assessing the gaming and viewing habits of low- and-no bandwidth households

| By Michael M. Wehrman
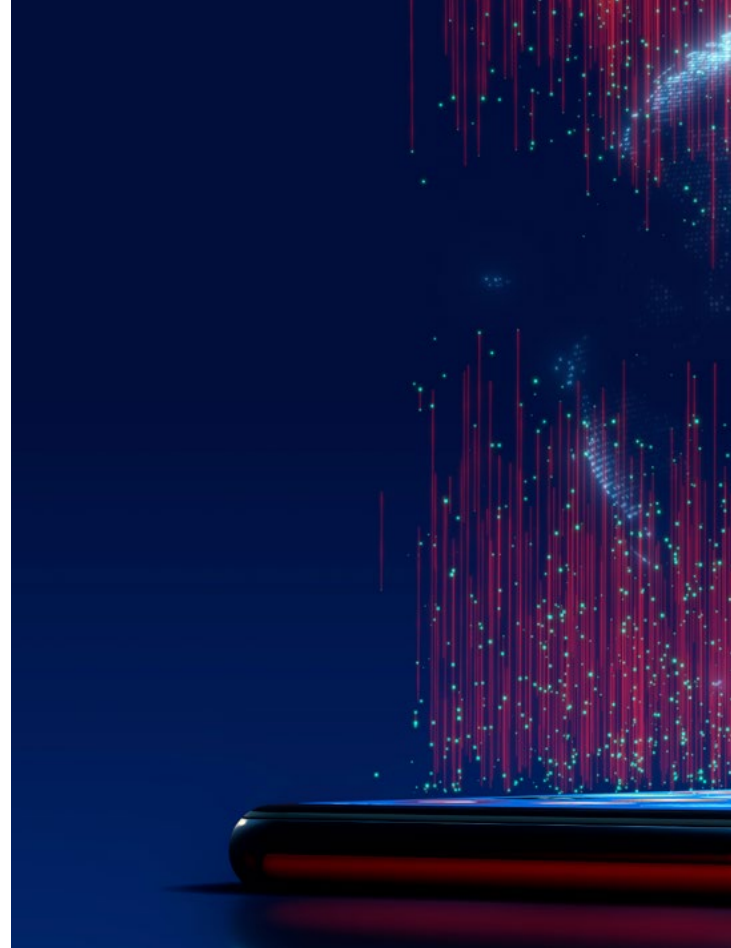
abstract

A study of low-data internet households by Comcast researchers revealed both the complexity of modern media consumption patterns and the importance of methodological agility in market research, as initial quantitative findings required qualitative investigation to uncover the underlying consumer behaviors.

Most of us can easily picture what we think typical household internet use looks like. Smart televisions streaming the latest hit shows, mobile devices displaying viral content on demand, consoles delivering lag-free multiplayer gaming sessions, smart devices playing music and podcasts, perhaps even long-distance commands to remotely change the thermostat or activate the vacuum. Such an example is one end of the spectrum – what of the other? What do we know about households that use very little data at all?

That audience, which we are calling "nontraditional internet" households, was the center of a research challenge. Difficulties in defining the audience (not just by the audience but the researchers) led us to pause mid-pilot; difficulties in interpreting quantitative results led us to pivot quickly to qualitative research in order to make sense of what could have been either a massive error in data collection or simply us missing vital context (fortunately, it was the latter). Through the team's curiosity and nimble efforts, we were able to make sense of this audience and realized just how much variety there is in how households entertain themselves today.

But before all that, we discovered the first hiccup: With a survey in-field, how could we be sure we've correctly identified nontraditional internet households in the first place?

Admitting your audience is hard to reach

While it's typically good (or great!) practice to write simple questions, when you have a difficult-to-identify audience, it's possible to miss the mark by being too simple. Our first major challenge was that our questions were too simple to start with:

- Who is your home internet provider?
- Who is your mobile/cell service provider?
- Which do you use more often?

Simplicity in the question masked complexity in the responses – we quickly realized that mobile devices connected to Wi-Fi (since we were asking specifically about activity in the home) might be incorrectly counted. To make matters more difficult, respondents also tend to struggle with accurately recalling how much time they spend connected to local Wi-Fi when in the home. It's all too common to scroll social media while watching streaming television; does that count as home internet, cell service – or perhaps both? With the right array of updated questions, added mid-pilot and aimed at validating that respondents were confident in the information they were providing us, we in turn were confident that we correctly identified the precise audience we were looking for: low-data-usage households.

We had little time for reprieve, however, as we immediately discovered that for an audience that is defined by how little they use the internet at home, on average they had about six devices per household.

When quant gives you more questions

Digging deeper into the data, it wasn't just the devices that upended the existing hypotheses about low-data-usage households. Our hypotheses included some expected patterns around household sizes (they would skew smaller), geography (more likely to be rural) and income (overindex in lower income brackets). The quantitative research showed results spanned all of these criteria and more. Nearly every single hypothesis we started with was nullified – admittedly, accepting that possibility is a cornerstone of why consumer research is needed in the first place.

Still, the number of devices being so high stood out not so much as a busted hypothesis but a logical improbability: With households using little data, relying on cell phones and/or low-speed internet services, how could they be so connected? After examining the data in the ways one typically might (was it reverse-coded or alternately-coded by the data collection tool?) to ensure the results are accurate, we decided to stand up qualitative

research as quick as we reasonably could. Stakeholders were eagerly anticipating results and we couldn't possibly share insights that didn't quite make sense absent any context. We needed answers and we needed them fast.

Our team designed an ethnographic study that was comprised of diary entries for a week at different points of the day – household usage varies during the day (as people are more prone to be at home vs. out) and across the week, as weekday and weekend habits can vary as well. We also followed up with in-depth interviews where we wanted to see participants' houses – where their internet connection sat in the house, where their connected devices were and to ask additional question on usage that emerged from the diaries.

But first we had to recruit and even though we had solved for the screening questions (given the need to do so in the quantitative portion), we found several fresh new challenges in front of us. When we were conducting this study (late 2022), households all across the world (and certainly the United States as well) were slowly emerging from habits and practices learned during the 2020 COVID-19 pandemic. One of those was an extreme reluctance to invite a group of (two or three) strangers into their house for an in-depth interview (at any level of participant compensation). Many potentially useful candidates instantly opted out of participation on this premise alone. Yet on the other hand, remember that this audience has lower-speed (or cellular-only) internet connections; their internet connections often weren't good enough to sustain a video call. With speed as a necessity, ultimately we mixed our approach – we went to households that would have us but also conducted video interviews with a number of others, hoping for the best (connection). At least we would have the diary entries as a single, steady point to collect data.

We had primed ourselves for dropped video calls, out-of-sync audio, poor frame rates and lots of inaudible answers. In truth, there was a bit of that but mostly in video quality; thankfully, the audio came through. Getting a tour of a participants' home isn't quite the same

spatially/sensorially when viewed through the lens of a camera phone but we finally, at long last, had context!

They're doing what? (Or: Make it a Blockbuster night)

This entire project threw me into a bout of nostalgia for the 1990s that I grew up in. After completing the quant portion, I felt a bit like the character of Willam in the Kevin Smith movie "Mallrats." He spent the film staring at a "Magic Eye" drawing, unable to see the sailboat hiding in plain sight. Our team had the data, yet no matter how much time I spent staring at it, I couldn't see the image beneath it all.

First things first, how did we explain the high-devices/low-data relationship? For the latter, it was simply a matter of finding entertainment outside of streaming. This audience was lagging behind typical American households in terms of adopting streaming platforms (and given limited bandwidth, this even extended to ad-based video on demand and free ad-supported TV services). For those households that did watch streaming services, the limited bandwidth meant that they could watch one program on one device at a time (and thus the household would have to agree on what everyone watched). Even households without streaming spent plenty of time watching television, however, relying on over-the-air broadcast television, home video collections and even physical disc rentals (via Redbox and similar services at retail stores they frequented). In short, what we discovered was not so much a difference in amount of time spent watching television but rather these consumers recognized the data limitations of their households and developed strategies to work around them. Renting videos through physical media? Certainly seemed as if the 1990s nostalgia proved to be a prescient framework for thinking through this research after all.

But Redbox rentals don't provide context on the number of devices (and certainly the DVD players weren't being counted among connected devices). When we asked about connected devices such as phones, laptops and so on, what we found was both quite

surprising yet also quite simple: sometimes a connected device is not a connected device any longer. The most common application of this was the discovery that when it was time for this audience to upgrade their cell phones, rather than trading in their old phones, many were keeping them instead. This was prominent in households with children. Old phones would have their SIM cards removed or deactivated so they could not be used as cell phones; parents would load games, videos, educational apps and more onto the phones and then give the device to their children to use as a constant source of offline entertainment. This practice saved money, kept children busy (and entertained) and did not put a strain on the limited data capacity of the household. Everyone wins!

Everyone save for the few children whose gaming habits demanded connectivity. We did hear from a few parents that their children needed to get online to play games (most commonly Roblox). While these households rarely had connections that could sustain a lengthy Roblox session, industrious children often found ways to get their playtime in, typically going to a friend's house or the local public library to be able to play online.

One crucial bit of context here is to point out that the disconnected devices didn't solely serve the purpose of circumventing bandwidth limitations but also to provide some early socialization to devices while also keeping children off the internet. While parents understood that they would be connected elsewhere (at school or in one of the aforementioned locations where they might play Roblox), the desire to limit the amount of time their children were connected as well as have some control over where and how they connected was cited as both a justification and benefit of being a low-data household. Cost savings might have been one driver of using a low-bandwidth or cellular-only service but many also mentioned safety/control for the connectivity habits of their children as an additional benefit.

To sum up what we discovered about the entertainment habits of limited-connectivity households: offline gaming, over the air television and physical media (owned and rented)

were consistent habits. A perfectly fine 1990s weekend was also a perfectly fine 2022 weekend. With that, we had resolution – vital context to resolve the seeming contradiction between limited connectivity and lots of connected devices. In "Mallrats," Willam did eventually see the sailboat after all – and so did we.

The value of taking time

For us, the critical takeaways start with the value of taking time during a pilot phase, particularly if you think the audience is hard to reach or hard to define. As insiders at a telecommunications company, if it's hard for us to settle on criteria, expect that to be doubly true for research participants. Having the ability to pause a day into data collection, gather our thoughts and try something new was essential – and beneficial. Calling a timeout is not the same thing as throwing in the towel and, in our case, likely saved the project.

Not being hesitant to fast-follow quant with qual was another major revelation. Conventionally, researchers use qual to generate insights that can inform gaps in knowledge essential to field quant research. In our case, the quant research revealed a relationship (limited connectivity and lots of connected devices) that, after accounting for all data-based possibilities, simply did not afford any intuitable explanations. Fast-following with qual was critical given our stakeholders' needs. The story and the business implications matter far more than the percentages and quantitative data. Discovering that context was precisely what we needed to unlock our understanding of this audience. ◐

Michael M. Wehrman is senior manager, growth insights at Comcast NBCUniversal. He can be reached at michael_wehrman@ comcast.com.
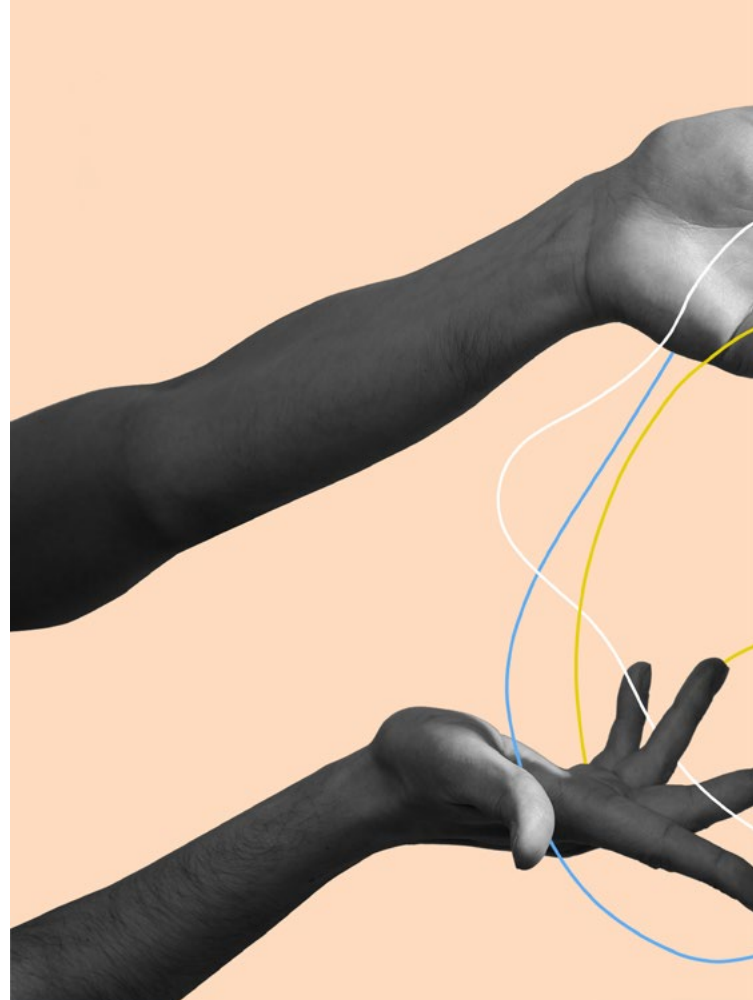
Maintaining a high rate of interest

Why periodic brand evaluation is crucial for financial institution growth

| By Kimberly Clay

abstract

For banks and credit unions, the gap between brand promise and customer perception can mean the difference between growth and stagnation. This guide shows how they can effectively measure their brand position, identify hidden weaknesses and develop strategies to align marketing messages with operational capabilities.

To find the truth behind a brand is to ask. You must understand and accept the responses. Once the results are accepted, strategies can be crafted and executed. Hopefully, your brand grows in the direction you want.

There are two groups that comprise the answer to a financial institution's brand: the prospective client in the target market and the existing customer. A prospective customer might never have heard of you. This would not be worrisome if you were a niche provider, such as a private bank or affinity-based credit union. But if you have operated branches in the market for some time, this lack of awareness might be cause for concern.

Then there is the established client and understanding why they continue to be your customer. Have you changed over the tenure of your relationship and how? Will they want to remain an acquaintance or become a trusted partner? Is this a single-service customer or will they open multiple products and use many services? Is the relationship healthy and does it generate introductions or recommendations to others based on their opinion of you?

The brand truth is the amalgamation of the reality expressed by the prospective client and the existing bond with a longstanding client.

An institution's brand is one of its most valuable intangible assets. Unfortunately, a misstep or hearsay could tarnish the brand beyond recognition. Scandals will quickly unravel years of building a reputation and telling a story. In these cases, the institution cannot leverage its brand for growth, as management is focused on damage control, which can be expensive and time-consuming.

A healthy and strong brand will survive miscues. Just like human nature, forgiveness accompanies loyalty. But at some point,
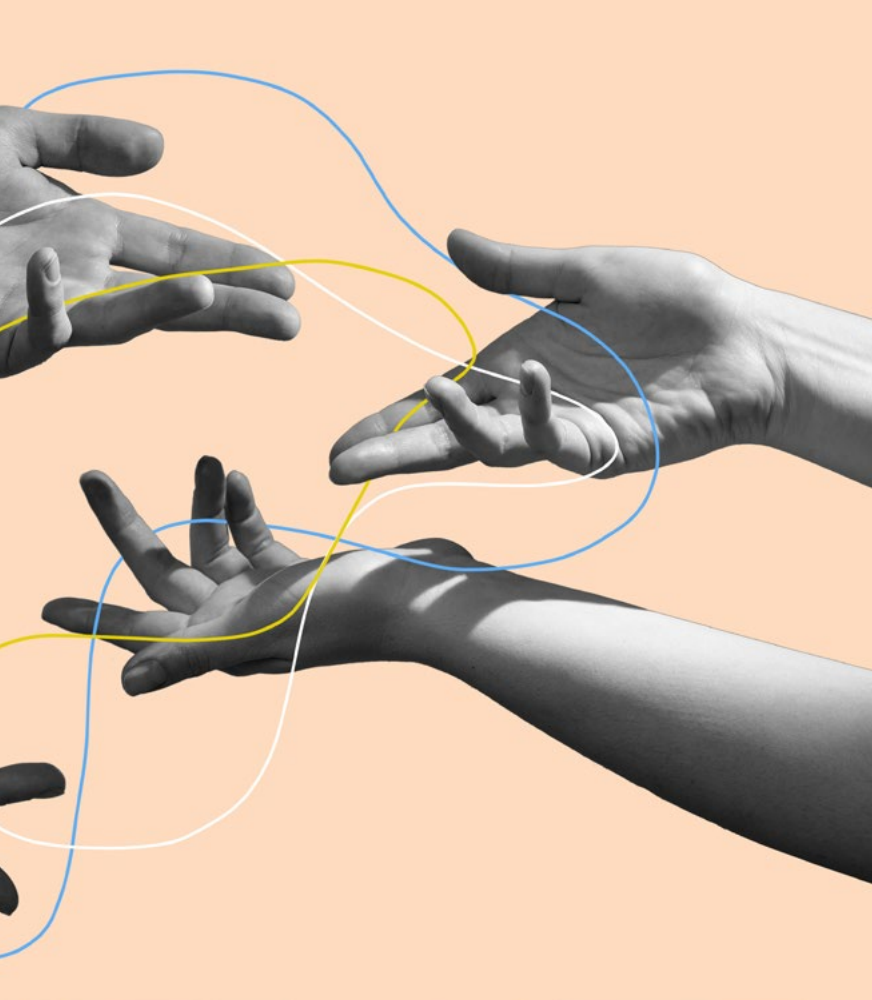
a reputation or brand will not survive a reoccurring onslaught of problems.

Knowing where you stand versus where others perceive you is the key in managing a brand. Quite often a brand is advertised as one persona when in fact it is not. Marketing has been instructed to sell something that the front line is ill-equipped to deliver on, because sales training was not involved or product management and IT did not stress-test the systems. In this all-too-common situation, dollars and time are allocated for damage control.

A promotion backfires

A $100 billion bank introduced a new service that would process business loan applications in 24 hours. The bank launched a massive advertising campaign and it was so successful that the branches, lenders and underwriters were overrun with traffic they could not handle. In the first three months, less than half of the applications were processed in 24 hours due to this excess volume. Most of those applications were turned down, as the promotion attracted more high-risk applicants than the bank normally experienced.

Although the front line was aware of the promotion, they did not know the timing of mailings, commercials and radio. The contact center was not informed of the promotion; therefore, they could not handle the surge in volume and the ensuing questions or complaints. There was plenty of blame to be shared for the overzealousness of marketing and product management.

Bancography's research illuminated the effects of business attrition on the consumer base, with a spike in consumer account closures. This was not surprising, as our data informs us that more than half of business owners maintain their personal accounts at the same

institution. When there is business attrition, half of these business owners will move their personal relationships as well. In response, the bank initiated intensive product training for the front line, including the contact center. Once completed, the bank launched a new campaign, targeting businesses whose loan applications were more likely to be approved.

A brand lie

An institution's brand message must also grow or evolve. All facets of the brand must align for the message to be clear; otherwise, it is a brand lie. Combating brand confusion requires extensive advertising investments, leaving few resources for product or service campaigns.

One example of a brand at odds with itself due to a disconnect between the brand's identity and its promise resulted from an internal struggle over vision. A $2.5 billion affinity-based credit union that originally served only teachers obtained a community banking charter, which allowed it to expand its branch network and open its doors to all. Despite the board of directors' support and approval of this change, they would not agree to update the name, logo or existing messaging. Regardless of this impasse, management proceeded to greenlight the marketing plan to promote the change in structure. All efforts failed to attract new members to the credit union. Bancography concluded that the confusion between the established name, suggesting exclusivity, and the reality that the credit union was now inclusive were not aligned; thus, the public did not understand.

Sometimes a brand will outgrow its name and logo, which can result in consumer uncertainty. For example, a brand with a geographic reference in its name or logo that expands its branch network outside that geography. Bancography first began working for a bank when it held $5 billion in assets and operated in one state. The state's identity was at the forefront of the bank's brand as a part of the bank's name and as the silhouette in the logo.

This client expanded into eight states in only 15 years. Now the brand sat at a crossroads, in that it outgrew its name and logo.

After Bancography evaluated the bank's brand, the bank decided to keep the logo since it resonated well with current and prospective customers. However, results from Bancography's study also revealed that the name of the state in which the bank originated did not resonate well in two of the newly expanded states. The bank decided to keep the logo and change the name, by using initials instead of the state name.

Managing a brand requires time, money, energy and effort. Evaluating the brand's position is essential for building growth strategies before implementing advertising or expanding the distribution network. Measuring customer feedback is vital in maintaining a level of service quality that will fuel cross-sell, upsell and loyalty. These efforts are perpetual, rather than episodic. These are the methods used to comprehend the brand truth.

Outside factors

An institution should undergo periodic evaluations of its brand to assess its position in the marketplace. While your institution may not have introduced any new products or services or expanded its distribution network, the competition might have. Their developments could have affected perceptions, which would in turn influence your current customers' opinion of you. Stated another way, your position could change because of outside factors not linked to your institution.

Say some of your competitors expand their branch networks and you maintain a stable network. The consumer may perceive your lack of branch expansion as a sign of apathy and now considers your network too small and less convenient. The market has evolved, while you have maintained the status quo.

As part of its growth strategy, an institution must evaluate its brand. Expanding your physical presence or developing an advertising campaign should occur in conjunction with measuring the marketplace's

current appetite for your brand, the competition and the industry.

One of Bancography's credit union clients ($4.3 billion in assets) evaluates its branch network every three years. While measuring current branch performance, the credit union also evaluates its brand. One branch exceeded industry standards, while another lagged. Is the brand to be held accountable or the branch? Analyzing the results from both studies in tandem illuminated the reason for the disparity in performance. For this client, the disconnect did not lie with the branches; rather, the competitor mix influenced the branch performance. Some markets hosted more credit unions than others and credit unions tend to compete for the same subset of the banking population – those who are loyal only to credit unions. Therefore, since competition was much fiercer for the client's branches in these markets, those branches did not perform as well as expected.

Where do you want to be?

To start the quantitative evaluation of your branch, first define your market based on your current branch network and where you want to be in two to three years. The latter represents your growth market. If you operate branches in a declining area or one where you intend to eventually exit, exclude that area. Focus on the areas with growth potential and where you want to expand in the immediate future.

An additional group to include in the study is existing customers or those with whom you have a relationship. The first reason for the existing-customer overlay is to ensure that there is enough representation from your institution for comparisons to the customers of the other competitors. This is vital if you are a smaller player in the market or the market has too many competitors. The second reason – and the most important motive – is to understand how the existing customer base perceives the brand relative to the prospects. We would like to believe that our own customers would identify our brand as top of mind (or as their primary financial

institution), when sometimes that is not the case.

According to our research, approximately 60% of banking customers and 50% of credit union members who maintain a checking or money market account plus one other product consider that provider to be their primary financial institution. For those customers who did not identify their institution as their primary, who did they cite and why? Understanding the disconnect between those customers who should have mentioned your institution as their primary and those who did is the first step in comprehending the brand truth. Collapsing or lessening this disconnect, or the brand lie, will support inordinate amounts of opportunity.

Awareness or potential

The first two questions in the survey should focus on brand awareness or market potential. This percentage represents the most market share the institution could achieve if it converted everyone in the target market who is aware of the institution into a customer. The institutions specifically named by the respondents are their considered set. In other words, if these customers leave your institution, they may move their accounts to these other institutions.

All institutions experience attrition but without brand awareness to replenish these losses and support cross-sell, the institution's customer base eventually will shrink.

Impact of awareness. Top of mind and secondary awareness are most important to advertising, for it is advertising's job to affect brand awareness through resonance of the message. Regardless of how good your products and customer service are, no one will choose you if you are not in their considered set (or among the first four institutions that come to mind). When a consumer shops for a product or relationship, they must be aware of your institution. If there is no awareness, then it is impossible for your institution to be considered when an opportunity arises.

Before advertising and marketing react to their awareness levels, they must carefully interpret the results, as they can be both positive and negative. All press (positive and negative) will inflate awareness, so the researcher must be informed on current events, in case of anomalies that could adversely affect awareness; for example, a CEO caught embezzling money or involved in a personal scandal. Blocks of advertising in areas where the institution doesn't have a presence will also falsely inflate awareness.

Current position. After determining the competitive landscape (brand awareness or market potential), it is time to uncover your institution's current position in the market. The survey asks the respondent to name the one institution they deal with the most – thus identifying their primary institution or provider. Market share (primary market share) defines the percentage of the targeted group who consider the institution to be their principal for meeting their financial needs.

Most of the time the respondent will mention their primary provider as top of mind. But in the case when it is not, the researcher must find out why.

Market opportunity is calculated by subtracting market share from brand awareness (or market potential). Conversion of this opportunity would be the goal for the immediate future, which is typically two years in banking. Realistically, the institution will not be able to convert all the opportunities into market share; however, any penetration equates to real profits.

An institution with some market share but zero brand awareness indicates that not a single respondent mentioned it, other than those who maintain their primary relationship there. In banking, affinity-based credit unions typically have very little secondary awareness, due to their exclusivity. In this situation, retention and upsell are vital for survival, as there are limited or no opportunities to replenish lost relationships.

Penetration of existing customer base. However, the most important discovery is how that group of customers who were already known to have a relationship with us performed. In banking, performance is predicated on those customers owning multiple products. These customers receive statements, newsletters, e-mails and direct mail, so we would assume they would mention your institution in the five opportunities afforded by the survey in defining brand awareness (four) and market share (one).

Despite these many steady touchpoints, Bancography's research indicates that 20% of bank customers and 25% of credit union members who maintain multiple products (with one being a deposit account) fail to mention their institution in the five opportunities allotted. These findings tend to make management uncomfortable, in that it unveils the truth behind cross-sell, penetration, loyalty, service quality, churn and attrition. Have marketing's efforts fallen on deaf ears or is the front line merely servicing rather than building
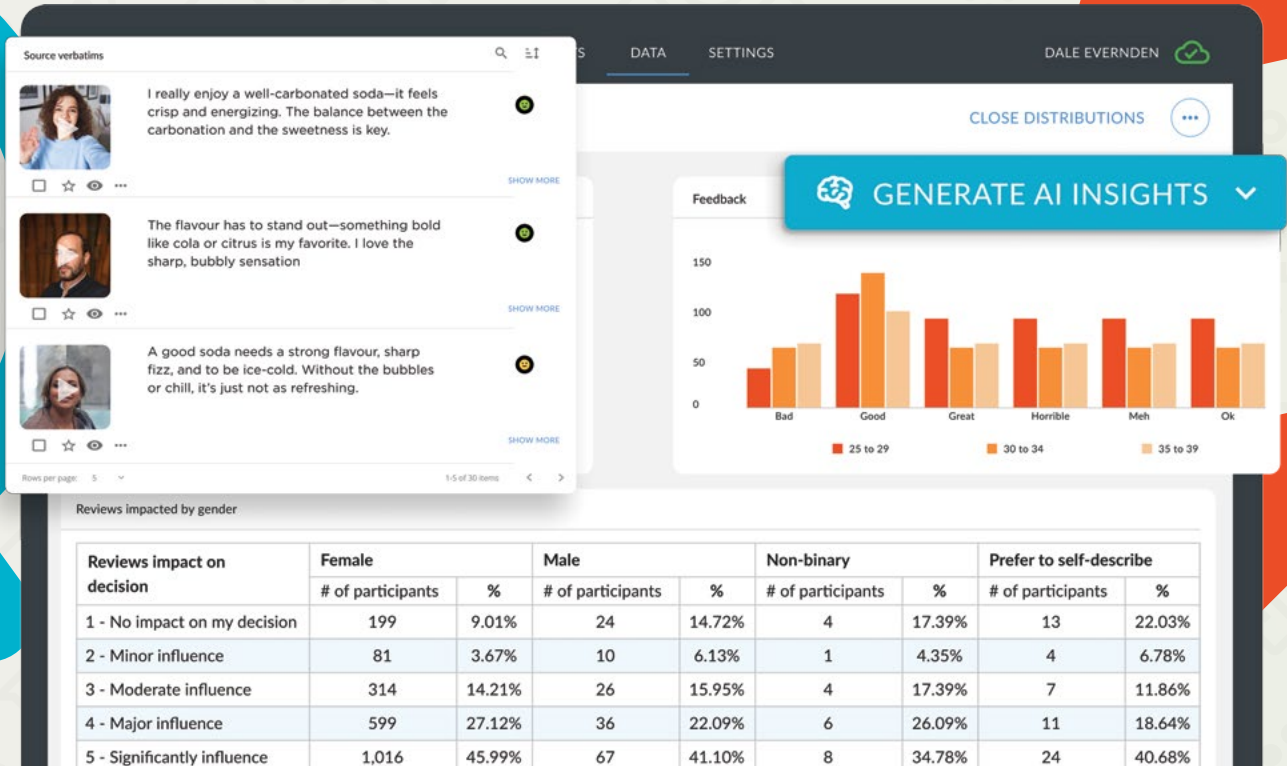
relationships? Fault typically lies with the latter.

When market share among the prospective customers has grown while internal market share as measured by the customer overlay is below average or has fallen, there is assuredly a churn or attrition issue. At this point, the institution is adding new customers just to replenish its losses, but it is not cost-effective to build an acquisition campaign when customers are leaving.

For those customers from the customer overlay who identified your institution as their primary provider, the other institutions they mentioned represent the primary competitors for these customers' next financial need (or their considered set of financial institutions). These customers might already have a single product or service with one of these institutions, identifying it as a secondary or tertiary provider.

Querying the brand awareness and market share data by the customer overlay reveals ways we can boost our current customer base. The brand truth emerges after we uncover the gap between perception and reality.

Gears shift

At this juncture in the study, gears shift toward fully understanding the relationship or connection between the institution and those who identified it as their primary by asking why they currently utilize it for their needs. Not only will these findings differ by market but they will also vary by competitor.

The convenience of the locations will prove more important in densely populated areas or ones saturated with competitors. The longevity of a local institution tends to receive more mentions in smaller, established markets. For a credit union, rates and fees will most often be cited. Credit unions typically receive more mentions of service quality than banks.

The other factors are just as important when comprising the full persona of the brand. The weight of these factors could align with intuition; but how does it line up with the competition? Is your institution

"Querying the brand awareness and market share data by the customer overlay reveals ways we can boost our current customer base. The brand truth emerges after we uncover the gap between perception and reality."

less convenient than others despite maintaining more branches?

Does your advertising lead with the age of your institution, yet the market overall does not care or seem to notice? The intent is to tout strength due to longevity. However, younger demographics may perceive the institution as old, stodgy and outdated.

Did a merger or acquisition surface as a motivator? If so, how long ago was the merger and is that relevant to exhaustion from the conversion? If the merger occurred a long time ago, the customer could be ready to move their relationship, as change is unsettling.

Was service quality not mentioned as the first or second utilization motivator for a credit union? Consumers expect credit unions to offer exceptional service. Not doing so is seen as a weakness.

All research should ask the respondent's likelihood to recommend their institution to others. This question acts as the single most important barometer of not only loyalty but also service quality.

Affinity-based credit unions and private banks (niche institutions) should have more loyal customers, followed by community banks. If the market hosts many of these types of institutions, they will inflate the overall loyalty average. The converse

is true when the competitor mix is skewed by many large commercial banks, since bigger is generally not better in terms of service quality and loyalty. Over-banked markets often display less loyalty, as the consumers disperse their relationship across more providers than usual.

Once we amass the groupings, we can view the brand's current position in the market and query this data by the primary competitors. If the customer base of one or your competitors offered a favorable opinion of your brand, this could yield an opportunity to target their customers.

The results from each question in a brand evaluator study yield valuable data. But the findings serve as mere coordinates on a map or tiles in a mosaic. Once the researcher has analyzed the data and factored in any outside market influences (such as mergers or negative press), then the story behind the brand is realized.

Positioned for growth

A financial institution's brand represents years of carefully built trust, customer relationships and market presence – assets that can erode quickly without proper monitoring and maintenance. Through systematic evaluation of both prospective and existing customer perceptions, banks and credit unions can uncover the critical gaps between their brand promise and market reality before these gaps become irreparable cracks in their foundation. By making brand evaluation an ongoing priority rather than a periodic exercise, institutions can ensure their brand remains strong, relevant and positioned for growth in an increasingly competitive financial marketplace. ⓞ

Kimberly Clay is director of marketing research and founding principal at Bancography. She can be reached at kimberly@bancography.com.

Beyond the handshake

How strong relationships drive B2B success

| By Katie Bender

abstract

A study of B2B decision-makers found that the most successful business partnerships aren't built on trust alone but rather on the combination of trust, relevance and affection. Companies fostering emotional connections with clients are up to four times more likely to be viewed as true business partners.

In today's fast-paced, hypercompetitive business landscape, building and sustaining a loyal customer base is more critical than ever. At Mower, our company philosophy, Making Fierce Friends, is all about forging deep, enduring connections that create value for clients and drive mutual success. While we've always believed in the power of these relationships, we wanted to quantify just how much of an impact they have – particularly in the B2B space.

To do this, we conducted a study targeting both B2B and B2C decision-makers, with B2B respondents spanning multiple industry verticals. Our approach was structured in three phases. First, we asked decision makers what factors they consider most important when choosing to work with a company, incorporating statements that reflected the pillars of Making Fierce Friends – trust, relevance and affection – along with control statements related to more logical factors like price, timelines and responsiveness. Then we asked respondents to name a company they partner with or buy from that is important to their business.

We presented decision makers with quantifiable business outcomes like recommending to others, repeat purchase, paying a higher price point and going to them first with new needs, to gauge their likelihood to take specific actions in relation to that company. We also included softer business outcomes like satisfaction and being considered part of the team. Finally, we asked decision makers to rate their agreement that a series of statements that embodied trust, relevance and affection reflected their selected company.

By utilizing a key driver analysis, open-ended responses and secondary research, we uncovered compelling insights into how these three pillars drive business outcomes, especially among B2B decision-makers. These insights provide actionable takeaways for marketers and companies looking to strengthen client relationships and fuel business growth.

must be evident not only in external messaging but also in every customer interaction.

Relevance: Staying aligned with client needs

What decision makers value most. Relevance – the ability to bring valuable expertise and understand a client's industry and business – is the next most important factor for decision-makers. Companies that can demonstrate deep knowledge of their clients' challenges and proactively offer tailored solutions are far more likely to build lasting partnerships.

How relevance drives business growth. Mower's research found that decision makers who say brands feel like the "right fit" are 2.1 times more likely than the average buyer to develop a long-term relationship with them, while those who are satisfied by a relevant brand are 2.5 times more likely to be a repeat buyer of the brand.

How to strengthen relevance. To demonstrate and enhance relevance:

- Stay ahead of industry trends and client-specific challenges to provide informed recommendations.
- Use data and research to tailor your messaging and offerings to individual client needs.
- Position your brand as a thought leader by sharing timely, insightful content.
- Offer personalized solutions rather than one-size-fits-all approaches.

Relevance – the ability to bring valuable expertise and understand a client's industry and business – is the next most important factor for decision-makers. Companies that can demonstrate deep knowledge of their clients' challenges and proactively offer tailored solutions are far more likely to build lasting partnerships.

Affection: Building lasting connections

What decision makers value most. Although decision-makers rated affection – the sense that a brand listens, goes beyond basic services and truly supports its customers – as slightly less important than trust and relevance, its derived impact on business outcomes is undeniable.

How affection drives business growth. Despite decision makers' stated view that

Trust: The bedrock of B2B relationships

What decision makers value most. When it comes to evaluating potential business partners, trust stands out as the most important factor overall. Following through on promises, being easy to reach and quick to respond and transparency are key areas that B2B decision makers evaluate when deciding whether to work with a company.

How trust drives business growth. Mower's research sought to take those stated areas of importance even further by tying business outcomes of that chosen company to the core pillars of Making Fierce Friends. Our indexed analysis shows that trust has a direct and measurable impact on business outcomes (Figure 1). Decision makers who feel brands meet their expectations are 2.6 times more likely than the average buyer to recommend that brand to others. And when a decision maker has a trusting history with a brand they are 3.8 times more likely to be a repeat buyer. Trust isn't just a feel-good attribute – it's the foundation that keeps customers coming back and drives word-of-mouth referrals.

How to strengthen trust. To establish and maintain trust with clients:

- Ensure transparency in your communications, especially when addressing challenges or risks.
- Clearly align on expectations and fully follow through on commitments to demonstrate reliability at every stage of the customer journey.
- Uphold strong ethical standards and maintain open, honest interactions.
- Create consistent messaging that reinforces credibility and stability.

B2B buyers want partners they can count on – not just vendors who provide a service, but companies that will stand by them for the long haul. For companies, this means fostering a culture of integrity, clear communication and a commitment to building relationships – values that

affection has less of an impact on working with a company, affection actually resulted in the strongest drivers of business outcomes. Decision makers who are passionate about a brand are three times more likely to pay a higher price for its products or services. Furthermore, decision makers who are passionate about a brand are three times more likely to pay a higher price point and 4.1 times more likely to view it as an actual business partner.

How to strengthen affection. To foster a deeper emotional connection with clients:

- Invest in personalized communication and customer experiences.
- Show genuine care for clients' success beyond the transactional relationship.
- Use storytelling to humanize your brand and create shared experiences.
- Be proactive in problem-solving, ensuring clients feel supported and valued.

Affection is about creating a two-way relationship between brands and customers. It goes beyond transactions and speaks to the deeper emotional bonds that make businesses feel like true partners.

How do the pillars interact?

Based on other research Mower has conducted over the years, we've long known that trust is truly foundational to building those strong relationships between a brand and its customers across customer type and industry vertical. However, we wanted to more deeply explore the impact that each of the three pillars of trust, relevance and affection has on business outcomes. Is trust an outsized contributor? Is two out of the three sufficient? After our initial look at the impact of each of the pillars on business outcomes as shared above, we ran an additional analysis on the impact of the presence of just one pillar, two pillars or all three pillars on the same business outcomes.

Our analysis showed that decision-makers who associate all three pillars with their evaluated company are significantly more likely to take positive business actions than those who perceive only one or two pillars.

Rather than thinking of trust, relevance and affection as a hierarchy,

Trust	Relevance	Affection
B2B decision makers who feel **brands met their expectations are**	B2B decision makers who say **brands feel like the right fit are**	When B2B decision makers **feel passionate about a brand** they are
2.6X	**2.1X**	**3.0X**
more likely than the average buyer to **recommend to others**.	more likely than the average buyer to **develop a long-term relationship with them**.	more likely than the average buyer to **pay a higher price point**.
B2B decision makers who **have had a trusting relationship with a brand are**	B2B decision makers who are **satisfied by a relevant brand are**	B2B decision makers who **feel seen by a brand are**
3.8X	**2.5X**	**4.1X**
more likely than the average buyer to **be a repeat buyer of their company**.	more likely than the average buyer to **be a repeat buyer of their company**.	more likely than the average buyer to **view the brand as an actual partner**.

Figure 1

a more accurate analogy is a three-legged stool – each pillar is essential for stability and success. This is particularly critical in B2B, where some might assume that affection plays a lesser role when building a case for data-driven and results-based B2B decision makers, but our findings prove otherwise: Without affection, even the most trusted and relevant brands fail to maximize their business impact.

Assessing your brand's strengths

Conducting a self-audit on the pillars of trust, relevance and affection can provide valuable insights into your brand's strengths and areas for improvement. Consider evaluating: brand perceptions through customer and market research, including specific measures of trust, relevance and affection, as well as customer experience; employee perspectives and advocacy – internal alignment matters for external impact; and the customer journey by mapping expectations versus actual experiences.

Once you've done a thorough assessment of how you measure up against trust, relevance and affection, here are five ways to harness the power of Making Fierce Friends:

Invest in relationship marketing: Develop initiatives that foster deeper connections with clients, such as account-based marketing, personalized outreach and client appreciation programs.

Build trust via transparency and follow-through: Be open about challenges, risks, and opportunities – honesty builds credibility. Set clear

expectations from the start, ensuring clients understand what can and cannot be delivered, commit to realistic goals and follow through on them consistently. Meeting or exceeding expectations strengthens confidence in your brand and fosters long-term loyalty.

Deliver relevant, tailored solutions: Focus on understanding your clients' unique needs and providing data-driven customized recommendations and strategies that address their specific challenges.

Leverage storytelling to evoke emotion: Use storytelling to humanize your brand and connect with clients on a personal level. Share success stories that illustrate how your partnership has delivered meaningful impact.

Align internal culture with external promises: Ensure that your internal culture reflects the values you promote externally. Employees who embody trust, relevance and affection are critical to delivering on the promise of Making Fierce Friends.

Better business outcomes

In a world where competition is intense and differentiation is challenging, relationships are the ultimate competitive advantage. By prioritizing trust, relevance and affection, companies can build partnerships that drive loyalty, advocacy and long-term success, leading to better business outcomes for everyone involved. ⬤

Katie Bender is vice president of research at Mower. She can be reached at kbender@ mower.com.
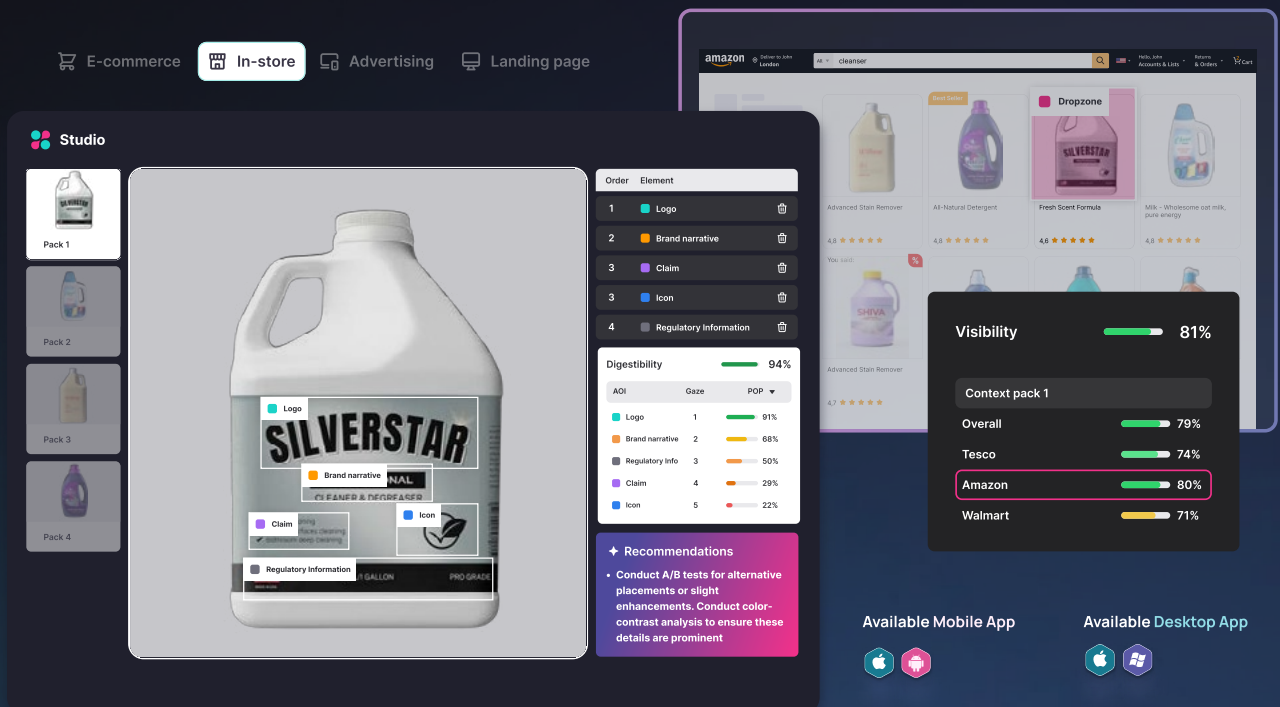
Actions speak louder than words

A comparison of two types of sample

| By Megan Copas and Patrick Coyle

abstract

Dairy-free creamer company nutpods found respondents from a behavior-based sample delivered more useful insights on purchase intent and product claims.

Research surveys are an indispensable part of making customer-first decisions; however, hard-to-uncover gaps in research quality can lead businesses down faulty paths. The well-worn mantra "garbage in, garbage out" takes on new significance in research methodology – a truth that's often acknowledged but rarely deeply examined. Imagine the cascading consequences of including respondents in a study who have no genuine connection to the brand or category: each false data point is like a small crack in a foundation, potentially causing an entire strategic structure to crumble.

You don't know what you don't know – and in the world of market research, this knowledge gap can be expensive. The unseen biases, the undetected inaccuracies, the subtle distortions that slip past cursory review can lead businesses down entirely wrong paths, resulting in misguided product development, ineffective marketing strategies and missed market opportunities.

To explore the impacts of sample quality on research outcomes, nutpods, a leading maker of dairy-free creamers, and 84.51° – a retail data science, research and media company – conducted an experiment comparing behaviorally verified respondents with self-claimed respondents, yielding critical insights on how a low-quality sample leads to different and flawed business decisions.

The DIY platform challenge

Nutpods uses survey research to gain consumer insights that inform business decisions. These research insights enable it to develop products and strategies that drive consumer delight. Nutpods uses many different research methods, including do-it-yourself research platforms that empower its team to quickly inform their decisions and hypotheses.

quality on research outcomes, by comparing self-claimed samples with behaviorally verified samples (Figure 1).

By understanding how different sampling methodologies impact business decisions, nutpods could make more informed choices regarding the allocation of its research budget. This allows the brand to determine when to utilize behaviorally verified samples and when a less rigorous approach is sufficient.

Methodology

The DIY platform challenge entailed fielding the same study in two different platforms: 84.51° In-Queries (a behaviorally verified platform) and a well-known traditional DIY platform. The questionnaire was designed to provide insights to the following business questions:

- What are consumer habits and practices around plant-based milk, creamer and coffee usage and perceptions?
- What are the top product attributes that impact purchase intent for plant-based coffee creamers?
- What are the top claims for the nutpods product and what impact do they have on purchase intention?

However, a close examination of screener and usage data raised concerns about the quality of respondents included in the studies.

To investigate these issues and find a solution, nutpods engaged 84.51° to conduct a head-to-head comparison of survey platforms – the DIY platform challenge. The study aimed to examine the impact of sample

Figure 1

Self-claimed vs. behaviorally verified samples: What's the difference?

Behaviorally Verified Samples	Self-Claimed Samples
Respondents are confirmed to meet specific behavioral criteria.	Respondents are recruited for research based on their self-reported purchases, behaviors or preferences.
This method ensures a higher incidence of qualified respondents who exhibit desired attributes and behaviors.	Eligibility is not verified through objective first-party data or behavioral evidence.
Insights are guaranteed to come from real people.	
KEY LIMITATIONS:	**KEY LIMITATIONS:**
Requires access to relevant data, such as loyalty card or transaction data.	Asking respondents to accurately recall granular details presents risks.
Expertise needed in designing the appropriate sample frame.	Research shows consumers struggle to precisely remember behavioral details over time.
	Inability to screen for complex behaviors.

Higher incidence rate for behaviorally verified sample shows it's more efficient in identifying category purchasers.

INCIDENCE RATE
% qualify for the study in the screener

84.51° In-Queries **72%**
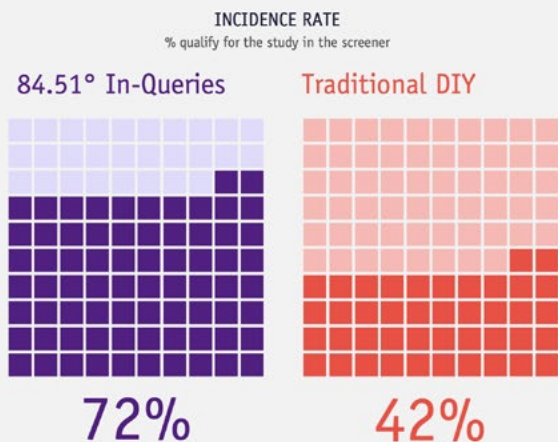
Traditional DIY **42%**

Figure 2

Traditional DIY sample shows inaccurate results when compared to national numbers.

ACCURACY
% buying compared to national numbers

- Coffee creamers: 66% Traditional DIY, 49% National
- Energy drinks: 65% Traditional DIY, 41% National

■ Traditional DIY ■ National
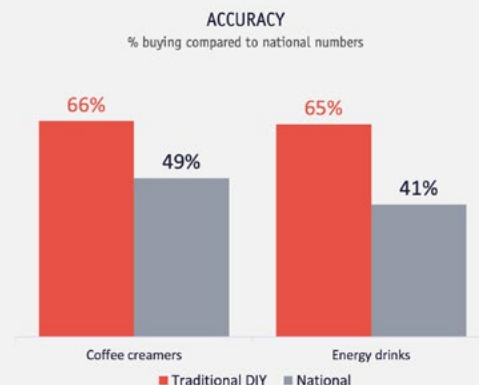
Source: Circana, LLC, Total US – All Outlets, NBD Dollar Adjusted, 52 Weeks Ending September 8, 2024

Figure 3

Survey respondents were screened for individuals who had consumed plant-based milk and coffee within the past three months. The traditional DIY platform qualified survey respondents based on self-claimed screener questions. In other words, respondents were selected through their own declarations of meeting the survey criteria.

In contrast, the 84.51° In-Queries respondent group was based on a transaction dataset, including more than 2 billion annual transactions and double-verified their eligibility through traditional screening questions.

The data collected from these studies was then analyzed, with comparisons made across the responses obtained from the two different platforms.

Findings
Sample quality and accuracy.
Measuring the efficiency of a sample through incidence rate is important because a higher incidence rate means more respondents are likely to qualify for the survey, making the sample-gathering process more efficient and cost-effective. With an incidence rate of 72% versus 42%, the behaviorally verified sample was significantly better at identifying respondents or cat-

egory purchasers who met the survey criteria (Figure 2).

Regarding accuracy, the percentage of respondents from the traditional DIY sample who reported purchasing coffee creamers and energy drinks deviated markedly from national averages (Figure 3). This discrepancy raised doubts about the DIY sample due to overstatements in the two categories.

The "yes to everything" phenomenon. When asked about coffee preparation methods at home, the behaviorally verified sample showed a more realistic distribution of responses, with 6% of respondents selecting every possible preparation method.

Figure 4

Percent selecting **every coffee preparation** at home — 6%, 50%
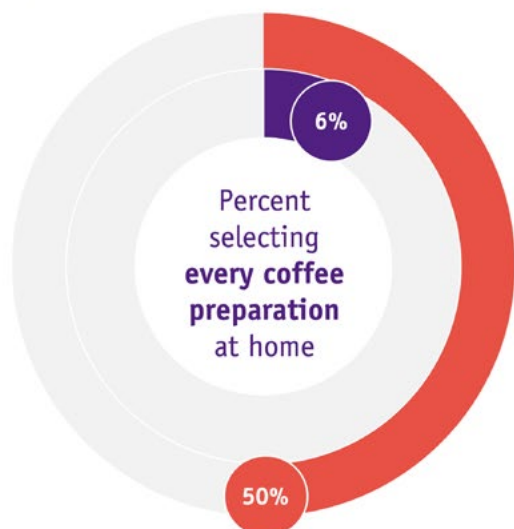
What types of coffee are prepared at home
% selected

- Drip (coffee pot, French press, pour over): 70% 84.51° In-Queries, 86% Traditional DIY
- Capsule / K Cup (Keurig, Nespresso): 55%, 72%
- Cold Brew / Iced Coffee: 54%, 85%
- Espresso: 39%, 79%
- Instant: 22%, 75%

■ 84.51° In-Queries ■ Traditional DIY
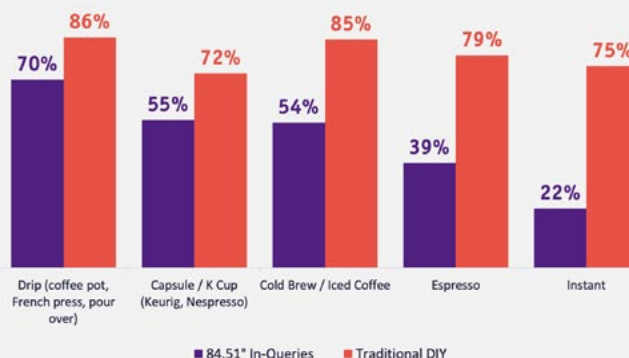
How do you MOST OFTEN prepare your coffee at home?
84.51° In-Queries n=150; Traditional DIY n=252
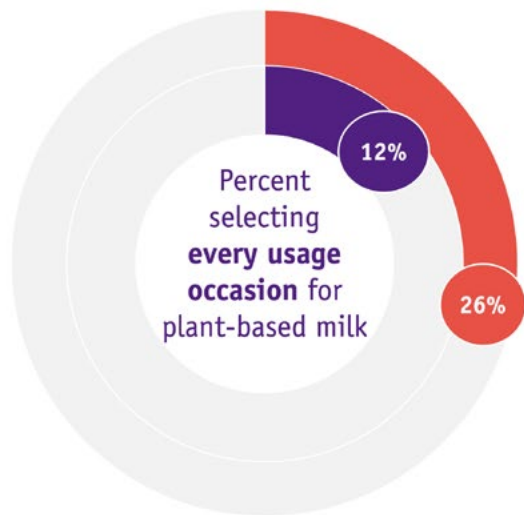
Figure 5

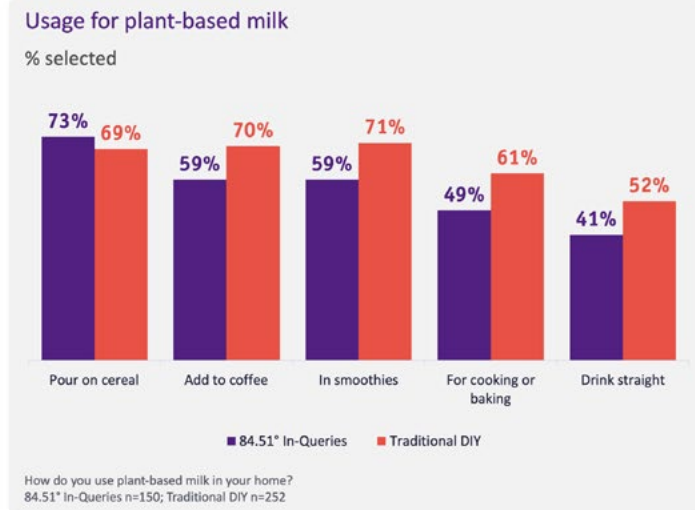**Usage for plant-based milk**
% selected

Figure 6

This contrasted with the traditional DIY sample, where 50% of respondents claimed to use every choice of preparation methods, raising concerns about data quality (Figure 4).

A high percentage of respondents that selected every usage occasion for plant-based milk also made it difficult to identify insights (Figure 5). For example, when asked, "How do you use plant-based milk in your home?" responses from the traditional DIY sample raised concerns about the lack of discrimination between uses, with responses at or close to 70% for nearly every usage occasion (Figure 6).

The behaviorally verified sample revealed more nuanced data: 73% used it on cereal and 41% drank it straight, clearly indicating the more common usage and highlighting potential opportunities.

Impact of claims on purchase interest

One of the objectives of the study was to identify the most impactful product attributes to promote. 84.51° In-Queries identified the claim that most effectively drove purchase interest
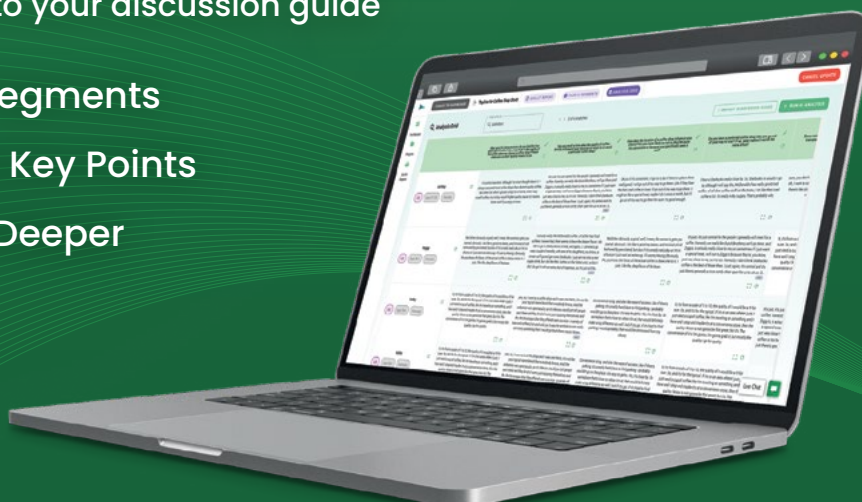
Statement impact on interest in plant-based creamers
% Top 2 box (most/very impactful)

CLEAR TOP CLAIM WINNER

To what extent would the following statements positively impact your interest in plant-based coffee creamers?
84.51° In-Queries n=150; Traditional DIY n=252

■ 84.51° In-Queries   ■ Traditional DIY
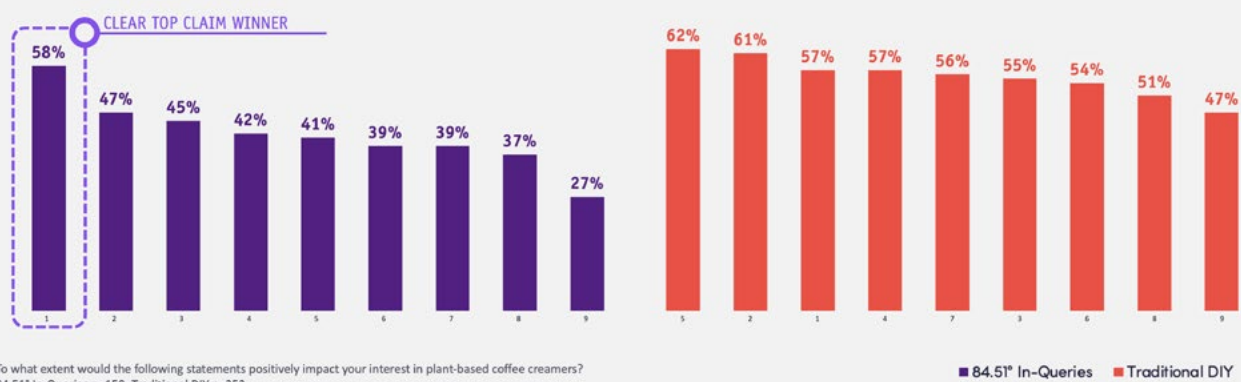
Figure 7

among respondents (see Figure 7). This claim resonated with 58% of respondents, significantly higher than other claims tested. In contrast, the traditional DIY sample showed a flatter distribution of responses, making it difficult to discern the most impactful claims.

The study also examined changes in purchase intent after exposing respondents to positive claims about nutpods. Respondents were shown claims such as, "nutpods has zero sugar and only 10 calories per serving," "nutpods is smooth and creamy without sweetness" and "nutpods has more quality certifications than any creamer or milk brand" (Figure 8).

The behaviorally verified sample showed a 1.5x increase in purchase intent post-exposure, while the traditional DIY sample indicated that customers were twice as likely not to purchase a nutpods product post-exposure (Figure 9). The finding that purchase

Figure 8

Likelihood to purchase nutpods
% Top 2 box (definitely/very likely)

56%
36%

Exposed to 12 positive claims about nutpods

43%
55%

Pre-exposure
Post exposure

■ 84.51° In-Queries ■ Traditional DIY
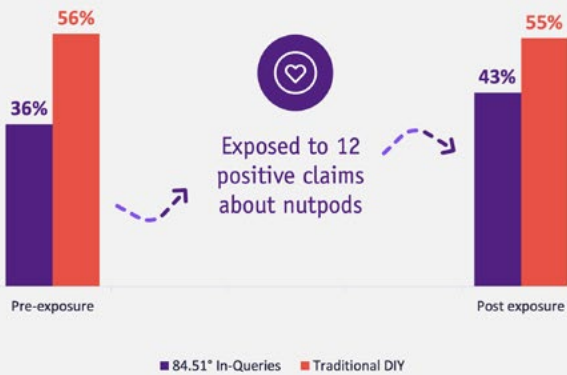
nutpods is a dairy free creamer made from almonds and coconut cream that is available in multiple flavors, both unsweetened and sweetened with organic cane sugar. How likely would you be to try nutpods for your coffee?
Based on all the previous statements about nutpods, how likely would you now be to try nutpods for your coffee?
84.51° In-Queries n=150; Traditional DIY n=252

Change in likelihood to purchase post claims exposure
% Decrease/Stay Same/Increase

84.51° In-Queries
1.5X ↑
more likely to increase

Traditional DIY
2X ↓
more likely to decrease

likelihood to purchase after claims exposure

Figure 9

likelihood decreased when customers were presented with positive claims further undermined confidence in making business decisions based on the traditional DIY results.

The difference in results between the two samples demonstrated the advantages of behaviorally verified sampling, ultimately reducing the risk of costly errors compared to traditional DIY samples. Behaviorally verified sampling results showed:

Enhanced accuracy and efficiency. The behaviorally verified platform and sample were found to be more efficient and accurate in identifying qualified survey respondents. This method showed a higher incidence rate of category purchasers and provided clearer, more reliable results. In contrast, the traditional DIY platform and sample, which relied on self-claimed screener questions, often resulted in inaccurate data and a higher likelihood of respondents selecting all options to qualify, leading to unclear findings.

Results ensuring reliable and informed business decisions. With behavioral data, marketers can ensure that 100% of the individuals in their study are real people (as opposed to bots) who are genuinely engaged with the category or their brand. This approach enhances the trustworthiness of the results and significantly reduces the risk of making ill-informed business decisions.

Make informed choices

While the behaviorally verified platform and sampling were more effective in ensuring data accuracy and reliability, this doesn't mean that traditional DIY platforms have no place in market research. Rather, understanding these differences in sample quality empowers brands to make informed choices about their research methodology and budget allocation.
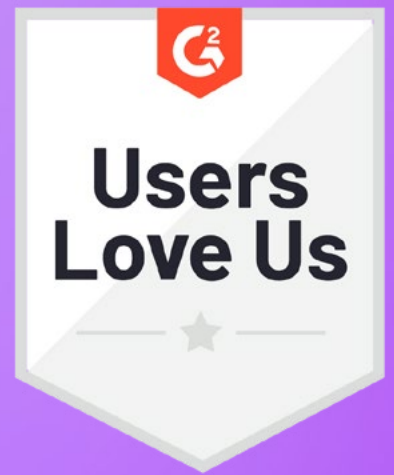
When precise, verified consumer behavior is crucial for high-stakes decisions, behaviorally verified sampling can offer rigor and confidence. For other research needs where absolute precision is less critical, traditional DIY platforms that use self-claimed sampling may suffice. The key is recognizing when each approach is most appropriate, enabling companies to optimize their research investment while ensuring the quality of insights matches their business objectives.

The diversity of research methodologies reflects the complex nature of consumer insights. Different research approaches offer advantages that extend beyond data collection. Behavioral verification represents a sophisticated lens through which brands can understand consumer motivations, revealing patterns that self-reported data might obscure. In this case, the depth of insight matters more than the breadth of surface-level information. By understanding the

subtle distinctions between sampling techniques, brands can develop more nuanced strategies that capture the intricate dynamics of consumer behavior.

As the retail landscape continues to evolve, savvy approaches to research will be crucial for brands seeking to stay ahead of the curve. Researchers must evaluate their research objectives, timeline and budget constraints when choosing between methodologies. Doing so will allow researchers to maximize the value of their investments and obtain the quality of insights needed for each business decision. ⓞ

Megan Copas is consumer research director at 84.51°. She can be reached at megan.copas@84.51.com. Patrick Coyle is chief marketing officer at nutpods. He can be reached at patrick.coyle@nutpods.com.

TheQuirksEvent.com
REGISTER TODAY!
YOU'LL BE IN GOOD COMPANY...

Below is a list of just some of the corporate brands that attend the Quirk's Event.

Abbott | Abcam | Abercrombie & Fitch | Absolute Collagen | **Activision Blizzard** | AKO Capital | Akzonobel | Allianz Insurance plc | Allwyn UK | Amazon | Amazon Prime Video | Amazon Studios | Ancestry.com | Asahi Europe & International | Asahi UK | ASDA | ASOS | Avanti West Coast | AXA Health | AXA Insurance | BA | **Bacardi** | Bahlsen | Bang & Olufsen | BAT | Bavarian Nordic | Bayer | Bettys and Taylors Group | BFI | Blue Light Card | Boots UK | British Airways | British Gas | British Red Cross | British Triathlon Federation | British Universities and Colleges Sport | BSCF | BT Group | BUCS | Cambridge | Cambridge University Press & Assessment | Cancer Research UK | Canva | Capital One | Carnival UK | Center Parcs | Church & Dwight Co. Inc | City and Guilds | City Football Group | ClearScore | Coca-Cola | Colart | Concha y Toro | Co-op | **Costa Coffee** | CVH Spirits | Deliveroo | Dentsu | DFS | DIAGEO | Digital Cinema Media | Domino's Pizza | Dow Jones | E.ON Next | easyJet | easyJet holidays | Economist | Edrington | Electricity North West | Elida Beauty | **England Rugby** | Enterprise Mobility | Epson Europe BV | Ferrero | Fidelity International | Financial Services Compensation Scheme (FSCS) | FMCG Pet Care | Footballco | Fresenius Medical Care | Frontiers Media | FSCS | Gen Digital | giffgaff | Glanbia Performance Nutrition | Gold Eagle | Goodstuff Communications | Google | Google EMEA | Gousto | Greene King | **Guardian News and Media** | Gymshark | Haleon | Havas | Havas Estonia | Hearst Networks EMEA | Heathrow Airport | Hiscox | Historic Royal Palaces | HM Revenue & Customs | HSBC | Hutchison 3G UK | IELTS | IGT Italy | IGT lottery | IKEA | innocent | IPG Mediabrands | Irwin Mitchell | J.P. Morgan | John Lewis Partnership | Just Eat Takeaway.com | Just Group plc | Karo Healthcare | Kerry | Kraft Heinz | L&Q | L&Q Housing | LADbible Group | Leeds Building Society | Legal and General | Lidl GB | Lindt | **Live Nation Entertainment** | Lloyds Banking Research | London and Partners | London Business School | L'Oreal | LRQA Ltd | M&S | M&S Food | Macmillan Cancer Support | Marks & Spencer | Mars | Mars Wrigley | Mastercard | McArthurGlen Group | McCormick | Merlin Entertainments | Meta | Molson Coors Beverage Company | Mondelez International | Monzo | **Morgan Stanley & Co** | Nationwide | NatWest | Nest | Nestle UK and Ireland | New Look Retailers Ltd | No 7 Beauty Company | Walgreens Boots Alliance | NSPCC | OANDA | Ofcom | Office of the Public Guardian | Ooni | Orange | Organon | Oura Health | OVO | Paramount | Peak Sports Media | Pearson | Penguin Random House | Pensions and Lifetime Savings Association (PLSA) | People's Partnership | PepsiCo | Pernod Ricard | Perrigo | Petplan | **Pets at Home** | Philip Morris Limited | PizzaExpress | PokerStars | Post Office | Principality Building Society | Procter & Gamble | Rail Delivery Group | Rathbones | Reckitt | **Red Bull** | River Island | Royal Shakespeare Company | RSA Insurance Ltd | Sage | Sainsbury's Supermarkets | Saint Gobain Interior Solutions | Samsung Electronics | Samworth Brothers | Shell Energy | Shell International Petroleum Company | Skanska | Skipton Building Society | **Sky** | Sofology | Spire Healthcare | Sport England | Standard Brands | Stanley Black + Decker | SuperAwesome | Taylors of Harrogate | **Tesco** | The AA | The Clorox Compamy | The Co-op | The Economist | The Football Association | The Institute of Practitioners in Advertising | The LEGO Group | The Rank Group plc | The River Group | Three UK | Tirlan | Transport Focus | Transport for London | **Twinings** | UK Civil Service | UK Health Security Agency | UKHSA | UM | UNICEF UK | UNiDAYS | Unilever | United Utilities | Viasat | Viking Cruises | Virgin Management Limited | Virgin Media | Virgin Media O2 | Virgin Red Ltd | **Vodafone** | Vodafone (Global) | Vue | Warner Bros | Warner Bros. Discovery | Weetabix Food Company | Wella | Whitbread | WM Morrison Supermarkets Limited | ybs | Yeo Valley | Zempler Bank | Zenjob Se | Zurich

THE QUIRK'S EVENT

THANK YOU TO OUR LONDON SPONSORS

LEGACY SPONSOR
GetWhy

PLATINUM SPONSOR
statista

GOLD SPONSORS

C A M | B R | I

emotional logic

GWI.

KANTAR

MARKET EXPERTISE

OAE STRATEGY STUDIO

Prelaunch.com

Stravito

SILVER SPONSORS

Brainsuite

bva Bdrc

HUMAN8

quantilope

RIVAL GROUP COMPANIES

toluna

BRONZE SPONSORS

appinio

Behaviorally
Decision Precision

Caplena

curion
Consumer Insights. Delivered.

discuss

dtect

dynata

E-Tabs
Data in sight

IN INSIGHTS NOW
Inspire. Innovate. Win.

mdi

nailbiter

recollective

SKIM

VOXCO | ascribe
by voxco

WONDERFLOW

www.TheQuirksEvent.com

TheQuirksEvent.com

ADDITIONAL SPONSORS

bounce Insights

Cint

CRUNCH.IO

Emporia

EMPOWER RESEARCH LOCALIZATION

fieldWORK

GLOBAL OPINE

innovate MR + IVY EXEC

mmr

Philomath Research — think like your customers

C&C

QUEST MINDSHARE

TESTSET

walr.

zappi

EXHIBITORS

Bilendi & respondi

boltchat AI

BOMI

BORDERLESS ACCESS — Redefining Reach and Insights

Civicom MARKETING RESEARCH SERVICES

CRG Global

Dig Insights

discover.ai

dvj insights

flex MR

Foresight Factory — Seeing Beyond

Forsta

FRC HONG KONG — Field Resources Consultant — China | Singapore | Malaysia

GiftPay

glaut*

GLOBAL LINGO — Fluent Communications

grayscale

hbg — DRIVEN BY CURIOSITY

inca

INDICO LABS

InfoShelter

ingress

Insights Opinion — Committed to excellence

InsightX Research Solutions

IRB — Accurate | Prime | Quick

jtn

Listen

Marketing Systems Group

MIS GROUP — MADE IN SURVEYS · MADE IN STUDIOS

my CLEAR OPINION — INSIGHTS HUB

norstat

Opinions LTD

Ovation INCENTIVES

panoplai

prodege

Product Hub. — Powered by MMR

PURESPECTRUM

Rakuten Insight

random Dynamic Research Inc.

RealEye

Slice

TOPPAN — TOPPAN DIGITAL LANGUAGE

torfac

TRACK OPINION

Tracksuit

visionslive

WOLFESTONE

woxi

Yesty

YONDER DATA SOLUTIONS

zoulloo

PARTNERS

AQR — Association for Qualitative Research

AURA — INSPIRING INSIGHT

icg — insight consultants group

IMA

10th MREF — Marketing Research Education Foundation

QRCA — Connecting. Educating. Advancing.

succeet — meet & succeed

LEARN FROM THE BEST IN THE BUSINESS

Making sense of the commercial media landscape in 2025 🚇

The IPA

This presentation uses data from IPA TouchPoints to help planners and advertisers better understand how the commercial media landscape has evolved and how this has influenced consumer behavior.

First, we look at the broad media landscape today. Then, we focus on understanding how the GB adult population spend their media day. Finally, we start to look at the differences between age groups and how shifts and changes have evolved. The shifts are not universal – the commercial media landscape is becoming increasingly fragmented and complex in some areas, while in others we're seeing increases in similarities between the commercial media usage habits of different age groups.

From scroll to screen: Film insights among Gen Z 🚇

LADbible Group

Innovating for inclusivity and impact: Exploring hidden opportunities in research among those age 65+ 🚇

Viking

🚇 LONDON
🚗 NEW YORK

How the powerful intersection of consumer insights and consumer experience can drive decision-making 🚗

First Horizon

Two worlds, two approaches: Understanding Hispanic audiences 🚇

Ingenium Research

Getting our business truly 'closer to customers' 🚇

M&S Food

Inclusive insights – Shaping the future of accessible research 🚗

Tamman Inc.

From insights to impact: Amazon's innovative framework for building customer trust 🚇

Amazon

Raising the bar 🚇

Kerry Group

Identity: The hidden key to enabling exceptional customer experience and loyalty 🚗

Ping Identity

Designing consumer research for packaging optimization: A deeper understanding of the packaging consumer's journey 🚇

Mondelēz International

Traditional consumer research for packaging development relies on physical prototypes, which are resource-intensive and limit early-stage refinements. We set out to rethink our approach to enhance consumer-centric decision-making. At the initial phase of development projects, it is valuable to leverage digital tools to screen packaging ideas up front, allowing us to identify the most promising ones before investing in physical stimuli. This ensures that we are measuring and refining the strongest prototypes, leading to more consumer-centric packaging solutions. Once physical prototypes have been developed, this study outlines how to design a more actionable consumer acceptance test (CAT) that captures the entire packaging journey – from first impressions to transportation, storage and disposal – while ensuring that consumer feedback leads to further improvements and support to deliver the desired consumer experience.

Lessons from a decade of our audience segmentation at Penguin 🚇

Penguin Random House

At Penguin Random House, we make books across the entire publishing spectrum. Our book-buyer segmentation, which covers two-thirds of U.K. adults, was developed in 2015 to empower publishing colleagues to make better, more audience-centric decisions.

Ten years on, our segmentation is well-embedded across the 10 publishing houses that make up PRH. The book market has proven resilient in the face of serious competition for time and attention from other media offerings, proving that there is still a demand for analogue entertainment in our digital world. Our segmentation drives an audience-centric culture that enables PRH to stay ahead of the curve in an increasingly complex media landscape. In this session, we will reflect on what we've learned during the last decade about how to use the segmentation to keep PRH in touch with readers in the U.K.

NETWORKING **&** FUN

Quirk's Happy Hour

The sessions might be finished but that doesn't mean you have to be done networking! Enjoy a beer or wine as you finish up conversations with fellow researchers in the Registration Foyer.

In-House/End-Client Roundtables

For the first time, Quirk's is offering roundtables to provide client-side researchers with unique networking and learning opportunities with peers. Engage fellow in-house researchers each morning at the Quirk's Event in insightful roundtable discussions near the Expo Hall, complete with a light breakfast.

When registering for the Quirk's Event, simply select the option to participate in the In-House/End-Client Roundtables. These discussions are exclusively for in-house/end-client researchers and are offered at no additional cost.

As a roundtable participant, you will join an informal yet structured discussion each morning of the Quirk's Event. These interactive, client-side sessions are designed to help you engage in real-world discussions and trend analysis.

Who should join?

Only in-house/end-clients market researchers can join (no suppliers/vendors or those registered in the 'other' category).

Introducing New Smart Badges

Quirk's is proud to introduce the latest event technology – Badgee! These interactive electronic badges allow for easy and fast networking in a touch-free environment. Attendees in close proximity can quickly exchange information simply by both pressing the bottom of the badge.

Badgee allows for important messages to be displayed right on your badge to ensure you don't miss any vital information. The smart badges will alert you when you have an upcoming session, and you can rate sessions from your badge.

cocktails WITH QUIRK'S

After the first day of the show is done, mingle and network in the Expo Hall and take in the experiences with other attendees. Complimentary drinks and appetizers will be provided. A few exhibitors' stands will turn into specialty bars, serving a variety of themed beverages.

●●● special advertising section

7 TOP DIY RESEARCH COMPANIES

DIY research can often be more cost-effective than traditional marketing research. It allows you to create your own research process and workflow but to avoid any issues along the way, it may be best to partner with a pro.

Marketing research companies that specialize in DIY research can offer a broad range of tools, technologies and platforms for any kind of research project.

1Q

Founded 2015 | 25 employees
Keith Rinzler, Founder and CEO

1 million+ guaranteed human panel, zero data fraud, real-time responses, no contracts, Radical Simplicity® and Radical Transparency®…what more could you ask for? 1Q is the highest-quality, easiest-to-use DIY consumer engagement platform in the industry. Hundreds of companies already use 1Q regularly – and once you try it, you'll never look back. 1Q's industry-leading geo-targeting capability allows you to target your audience based on their current location, past locations and future destinations. We have the best respondents because we're the only company in the world that pays our survey respondents instantly, in cash, directly to their PayPal account or to the PayPal account of a charity of their choice. Other features include unlimited recontact capability, unbelievably candid open-ended responses, photo-response for in-store, aisle sequencing, etc. and "Guaranteed Watch & Respond Video" capability. No bots. No contracts. No minimums. No kidding.

E-mail account_support@1q.com
Phone 1-404-913-0850
1Q.com

Cursory Technologies

Founded 2022 | 50+ employees
Vinaya Raj Rao, CEO

Cursory Technologies is a pioneering SaaS company revolutionizing market research with agile, AI-driven automation. Our flagship product, Brisk®, is the first-of-its-kind LLM-based tool that converts Word document questionnaires into logical surveys in under five minutes, compatible with Forsta, Qualtrics, Dimensions and many more. Our automation extends to data validation with SPSS scripts in seconds, a data quality check tool for precise insights including bot recognition and data tabulation with Quantum scripts in minutes. Additionally, our qualitative recruitment platform enables IDI and FGD recruitment across 150+ markets in minutes. Beyond automation, we provide agile, end-to-end market research services from survey scripting, translations, open-end coding, data tabulation and charting to dashboards, including global data collection. With cutting-edge AI and deep industry expertise, Cursory Technologies ensures 10X faster, 100% quality and 5X cost-effective research solutions globally.

E-mail vinay.rao@cursory-tech.com
Phone +91-8971407001
cursory-tech.com

Displayr

Founded 2007 | 101 employees
Tim Bock, CEO
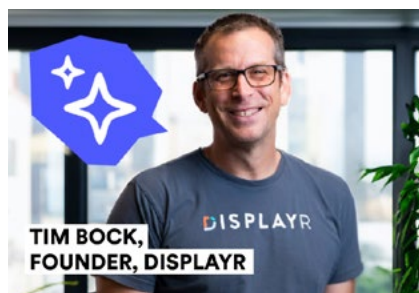
AI and DIY research tools are reshaping market research. Clients expect insights faster and cheaper, and researchers who embrace AI-driven automation will stay ahead. Tasks like weighting data, significance testing, segmenting audiences, summarizing open-ends and building reports – once time-consuming – can now be automated. But AI alone isn't enough. The real value lies in human expertise: validating findings, interpreting results and uncovering the "why" behind the numbers. That's where Displayr comes in. Our AI-powered software automates the heavy lifting – cleaning, analyzing and visualizing data – so you can focus on finding the insights that matter. Stay ahead of the curve. Try Displayr today.

E-mail support@displayr.com
www.displayr.com

Enumerate.ai

Founded 2020 | 10+ employees
Manan Beg, CEO and Co-Founder
Rick Sullivan, Head of Global Engagement
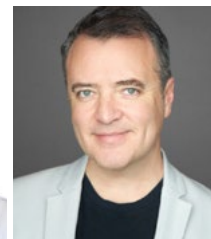
Enumerate.ai is the all-in-one solution for market research and consumer insights professionals seeking advanced, trustworthy research intelligence. Our powerful AI-driven platform automatically transcribes and analyzes IDIs, focus groups, open-ended surveys and video diaries in 40+ languages with up to 98% accuracy, then swiftly uncovers key insights in near-real time. This means you can accelerate analysis by 70% while reducing manual effort by 85%. Our approach ensures top-tier reliability: Your data remains private, never used for AI training, letting you focus on what matters most – finding great insights. Count on our high-touch human support to guide your decisions every step of the way, with confidence.

E-mail rick@enumerate.ai
Phone 1-773-991-7229
www.enumerate.ai

KANTAR

Kantar

Founded 1996 | 600+ employees
Caroline Frankum, CEO

The Profiles team at Kantar is the industry-leading data services provider, delivering the highest-quality data through proprietary panels and innovative technology. Our DIY survey solution gives brands control over research, enabling faster, more agile data collection via our Accelerated Answers platform. With unmatched targeting capabilities and a research-backed approach to engaging respondents, we support data collection across industries – helping brands explore new markets, test concepts and refine strategies with confidence. Backed by continuous AI-driven innovation, the Profiles team at Kantar is your strategic partner for essential data collection – delivering the quality you expect with the flexibility you need.

E-mail profiles@kantar.com
www.kantar.com/profiles

REPDATA

Rep Data

Founded 2020 | 91 employees
Patrick Stokes, CEO

Research Desk by Rep Data is a quality-first DIY sampling platform built for researchers who demand real, reliable and fraud-free data. Designed for ease and efficiency, Research Desk streamlines project management with intuitive tools that put researchers in full control of their studies. Research Desk is the only DIY solution that fully embeds industry-leading fraud prevention from Research Defender, ensuring that every response meets the highest standards of authenticity and accuracy. Whether running a quick-turn study or managing a large-scale project, researchers can trust Research Desk to deliver cleaner data, faster. For those needing additional support, Rep Data also offers full-service data collection with the same hyper-focus on data quality and consistent execution.

E-mail reps@repdata.com
www.repdata.com

symmetric
scientifically balanced samples worldwide

Symmetric, A Decision Analyst Company

Founded 2016 | 100+ employees
Jason Thomas, CEO
Arianne Larimer, President

Symmetric owns and operates American Consumer Opinion®, a worldwide online panel that reaches over 7 million consumers in 200-plus countries, spanning North America, Latin America, Europe and Asia. Consumers can sign up to become members in one of 11 languages and complete demographic profiles are maintained for each household. Symmetric also operates five B2B worldwide online panels: Physicians Advisory Council®, Medical Advisory Board®, Executive Advisory Board®, Contractor Advisory Board® and Technology Advisory Board®. Symmetric places 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. Non-responders, speedsters and cheaters are continually purged. Symmetric provides sample for quantitative and qualitative research and online and offline projects. Additional services include programming, hosting, online communities, tabulation, coding and IHUT mailing.

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

Prelaunch.com

A Revolutionary Method to Test **Bold Ideas**
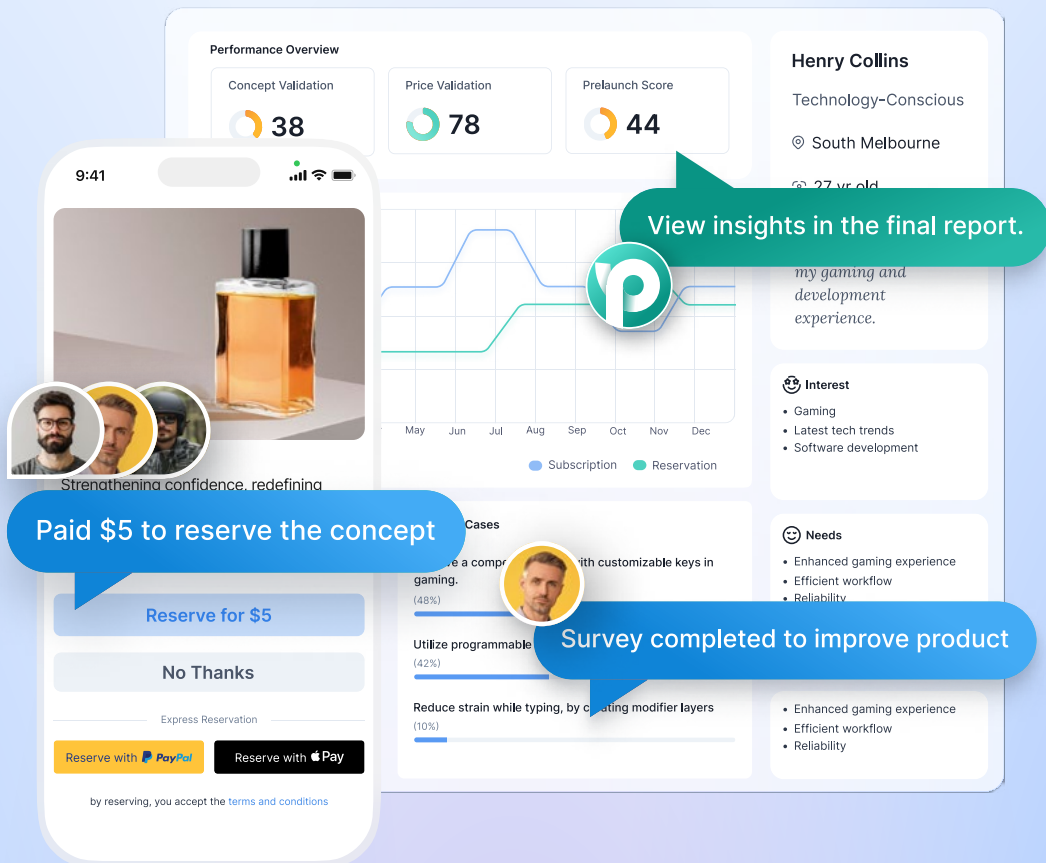
See Prelaunch

QUIRK'S TIME CAPSULE

Facts and findings from nearly 40 years of Quirk's
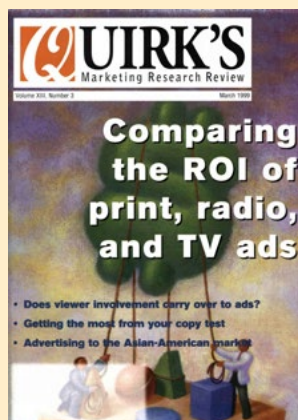
Tips for navigating an information-packed world even more relevant today

Stephen Elson wrote an article for the March 1999 magazine titled "Seven signs of fallout from the internet explosion." In it, Elson stated that the mental response to information overload is decision avoidance and that despite the amount of information available, we seem to know "more and more about less and less." Furthermore, Elson observed that a sign of information fallout is that life consists of the immediate past and immediate future with no time for the present moment. In his fourth point, Elson wrote something that is still relevant today with the rise of short-form content on social media platforms: "Your attention span is getting shorter. I repeat, your attention span is getting shorter."

The article concluded with six ideas to clear up information fallout. Taking breaks from information, gaining fresh perspectives by calling in the experts, joining a committee to clean up information fallout in your office and asking yourself "What's right?" instead of "What's next?" are some solutions. Elson also encouraged people to learn what others are doing to reduce "the data tsunami," a term coined by Richard R. Nethe in a 1996 article in The Humanist. Lastly, people should remember the reason for invention: necessity.

1999

User-friendly websites = repeat visitors

Another Survey Monitor entry in the same issue, this one titled "Make your website a site to see," reported results from Forrester Research's 1998 Consumers & Technographics Media Field Study. Consumers were asked to list the sources they used most frequently to acquire web addresses. Fifty-seven percent of those online used search engines to find websites and others pointed to e-mail messages and links found on websites to find URLs. Others said they found out about websites by word of mouth (28%). Compared to entertainment- and family-motivated consumers, career-motivated consumers relied more heavily on suggestions from acquaintances.

Forrester found that experiences, rather than brand names, led consumers back to certain websites and determined that consumers valued a website's content quality the most. Consumers were also more likely to use websites with intuitive interfaces and those that downloaded quickly. Website designers and marketers were encouraged to ensure their websites appeared as a first choice when potential visitors used a search engine, drive customers to invest time on their website and to prepare for multiple access points from different devices to improve their traffic.

The top TV ads in 1999

In 1999, research firms were questioning something we still wonder about today: How effective are TV ads? The Kid Ad-Traction study, which included over 800 children ages 6-17, found that product desirability did not result from high rankings or entertainment value. The Survey Monitor section entry titled "Do TV ads make kids want to buy?" listed the top motivating commercials, which included Sony PlayStation; Nintendo 64; Barbie; Taco Bell/McDonald's; Burger King; Laser Tag; Tyco Remote Control Car; Giga Pet/Nike/Volkswagen; Legos and Levi's. Sixty-nine percent of the children surveyed said a commercial motivated them to want what was advertised because it included demonstrations of a product's features and benefits.

Scan to access all Quirk's back issues.

CALENDAR OF EVENTS

●●● can't-miss activities

ESMOAR will host ESOMAR Latin America on **April 1-3** in **Lima**. Visit https://esomar.org/newsroom/latin-american-call-for-speakers-2025.

Quirk's Media will host The Quirk's Event – Chicago on **April 2-3**. Visit https://thequirksevent.com.

Merlien Institute will host MRMW APAC on **April 9-10**. Visit https://apac.mrmw.net/.

PAA will host its Annual Meeting on **April 9-12** in **Washington DC**. Visit https://www.populationassociation.org/events-publications/future-past-meetings.

UXinsight will host the UX Insight Festival on **February 14-16**. Visit https://uxinsight.org/ux-research-conference-festival-2025.

American Statistical Association will host Symposium on Data Science & Statistics on **April 29-May 2**. Visit www.amstat.org/meetings/symposium-on-data-science-amp-statistics.

Quirk's Media will host The Quirk's Event – London on **May 7-8**. Visit https://thequirksevent.com.

Corinium Global Intelligence will host CDAO Sydney on **March 7-8**. Visit https://cdao-syd.coriniumintelligence.com/.

WBR will host eTail Connect East on **May 7-9**. Visit https://etailconnect.wbresearch.com/.

Generis Group will host the American Packaging Summit on **May 13-14**. Visit https://uspacksummit.com.

Merlien Institute will host UX360 Germany on **May 14-15**. Visit www.eu.ux360summit.com.

WBR will host eTail Asia on **May 14-15**. Visit https://etailasia.wbresearch.com/.

Strategy Institute will host its annual Customer Experience Strategies Summit on **May 14-15** in **Toronto**. Visit www.customerexperiencecanada.com/.

QRCA will host the QRCA Worldwide Conference on **May 14-16**. Visit www.qrca.org/page/2025-worldwide-conference-central.

AAPOR will host its Annual Conference on **May 13-17**. Visit www-archive.aapor.org/Conference-Events/Upcoming-Conferences.aspx.

IQPC will host BX BFSI USA Exchange on **May 19-20**. Visit www.quirks.com/events/cx-bfsi-usa-exchange-2025.

WBR will host eTail Nordic Connect on **May 20-21**. Visit https://etailnordicconnect.wbresearch.com.

Informa Connect will host the Front End of Innovation Conference on **May 19-21** in **Boston**. Visit https://informaconnect.com/feiusa.

My Digital Shelf will host the Digital Grocery Summit USA on **May 21** in **Chicago**. Visit www.digitalgrocerysummit.com.

Gartner will host Garnter Data & Analytics Summit Japan on **May 20-22**. Visit https://www.gartner.com/jp/conferences/apac/data-analytics-japan.

MSPA will host the MSPA EA Conference on **May 20-22**. Visit https://mspa-ea.org/en_GB/events/eventitem/34-mspa-ea-conference-20-22-may-2025-tallinn-estonia.html.

GIA Global Group will host World Data Summit on **May 21-23**. Visit https://worlddatasummit.com/europe/.

Canadian Research Insights Council will host CRIC Conference on **May 27-28**. Visit www.canadianresearchinsightscouncil.ca/event/cric-conference-2025-save-the-date.

Forrester Research will host the CX Summit EMEA on **June 2-4** in **London**. Visit www.forrester.com/event/cx-emea.

WBR will host Future Stores on **June 3-5**. Visit https://futurestores.wbresearch.com.

Event details as of March 3, 2025. Please see websites for more details.

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

RACE AROUND THE WORLD FOR EDUCATION

MREF Marketing Research Education Foundation

WALK. BIKE. RUN. GIVE.

MAY 1-31, 2025 – GLOBAL

This May, join the marketing research and insights industry to walk, bike and run around the world to advance STEAM educational opportunities for children worldwide.

How does it work?
Participants from all around the world will walk, run and bike in a virtual race to raise money for children's education.

How do you join?
Signup is free, but we hope you'll consider a donation. To learn more and register, visit www.mrgivesback.org/race!

Who can participate?
Everyone is welcome to join the race! Invite your coworkers, friends and family to join in the fun.

SPONSOR A TEAM

Show your commitment and rally your employees by sponsoring a team!

Each team receives a special signup link and will have their company name and logo featured on the race website as well as in promotional material.

Visit www.mrgivesback.org/sponsor or contact alana@mrgivesback.org to learn more.

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

MREF 10th Anniversary Marketing Research Education Foundation

www.mrgivesback.org | info@mrgivesback.org

INDEX OF ADVERTISERS

10 minutes with...

Erika M. DeLeon
Senior Category and Consumer Insights, Juanita's Foods

How did you first become interested in consumer insights?

My passion for consumer insights began during my time as a category manager at Unilever, where I saw firsthand how data-driven strategies could transform the retail landscape. I was particularly fascinated by the intersection of macro trends and micro behaviors – how broad market shifts shaped consumer preferences, while small tactical changes, like shelf placement or assortment optimization, could significantly influence purchasing decisions. Seeing insights come to life in real-world execution sparked my curiosity and cemented my belief in the power of consumer understanding.

When I joined Juanita's Foods, there was no formal insights function, presenting both a challenge and an opportunity. It became clear that for the business to grow, we needed more than just data – we needed meaningful intelligence to shape category strategies, selling stories and long-term innovation. Working alongside cross-functional teams, we built a strong research foundation by leveraging panel data, consumer studies and competitive analysis to support more informed decision-making. Within the first year, we secured dedicated research funding, laying the groundwork for deeper investment in insights. Since then, the company has significantly expanded its commitment to understanding the consumer base, which continues to be a key driver of growth for retailers.

What excites me most is the evolving role of insights – not just as a reporting tool, but as a strategic driver of innovation and market expansion.

What strategies would you recommend to researchers on small insights teams to help maximize the impact of their market research findings?

Maximizing impact starts with prioritization. It's essential to understand your team's bandwidth and focus on the research that will drive the greatest organizational value. Developing a multiyear insights strategy ensures alignment with company objectives while also mapping out the necessary investments and resources for growth.

Collaboration is key – gaining cross-functional buy-in allows insights to be integrated across departments and, when possible, shared responsibilities can help extend the team's reach.

Additionally, insights should be actionable and adaptable. Tailoring research to company priorities ensures findings resonate with key stakeholders. Where possible, collecting data at a granular level – by region, retailer or product – enables customized storytelling, making insights more compelling and directly relevant when opportunities arise.

By being strategic, collaborative and adaptable, small insights teams can amplify their impact and ensure their research drives real business decisions.

How do you work to ensure that your research accurately captures the diverse perspectives within the Mexican consumer segments?

Our portfolio is deeply rooted in authentic Mexican products, and authenticity is central to our brand identity. To stay true to our essence, it's crucial that we understand the needs, preferences and perceptions of both Mexican consumers and those who simply enjoy Mexican food in the U.S. We are committed to ensuring our research captures a broad spectrum of these perspectives. By collaborating with expert research partners and leveraging their access to cutting-edge tools, we can execute research more efficiently, ensuring that our insights are not only accurate but also actionable.

"What excites me most is the evolving role of insights – not just as a reporting tool, but as a strategic driver of innovation and market expansion."

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

WebMD Medscape Market Research Services

We offer unparalleled reach to the largest, most engaged and highest value network of physicians and prescribing health care professionals for your **quantitative** or **qualitative** research.

WHY US?

☑ We offer you what no other healthcare market research company can: **engaged healthcare professionals who are regularly accessing Medscape for clinical content. Our market research team leverages these Medscape members to provide you with research solutions that deliver high quality results.**

☑ We leverage our first and third party data e.g. prescribing behavior, work setting, therapeutic areas to deliver **advanced targeting capabilities** to get you the precise respondents that you need.

☑ Medscape develops a relationship with physicians typically during med school and maintains that relationship with them throughout their career.

WebMD®
Medscape®
WebMD Professional

Market Research

Need a quote?
Click here or contact us at www.medscapemarketresearch.com