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PLUS

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Quirk's Marketing Research Review

JULY/AUGUST 2025
VOLUME XXXIX NUMBER 4
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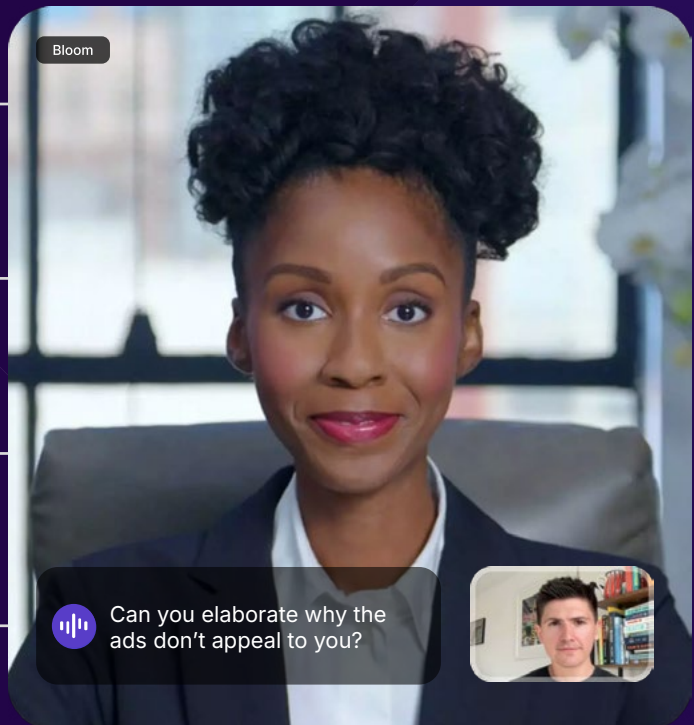
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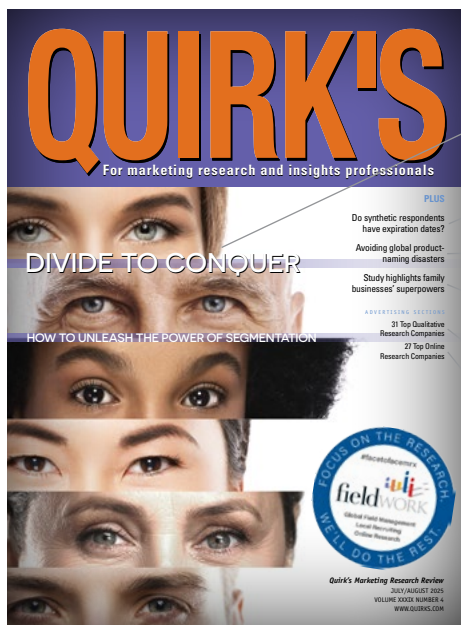
●●● Write for Quirk's

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



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AI powered insights for more successful product launches



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Consumer insights on tech-enabled advertising channels: From gaming to influencer marketing

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Research Careers Blog

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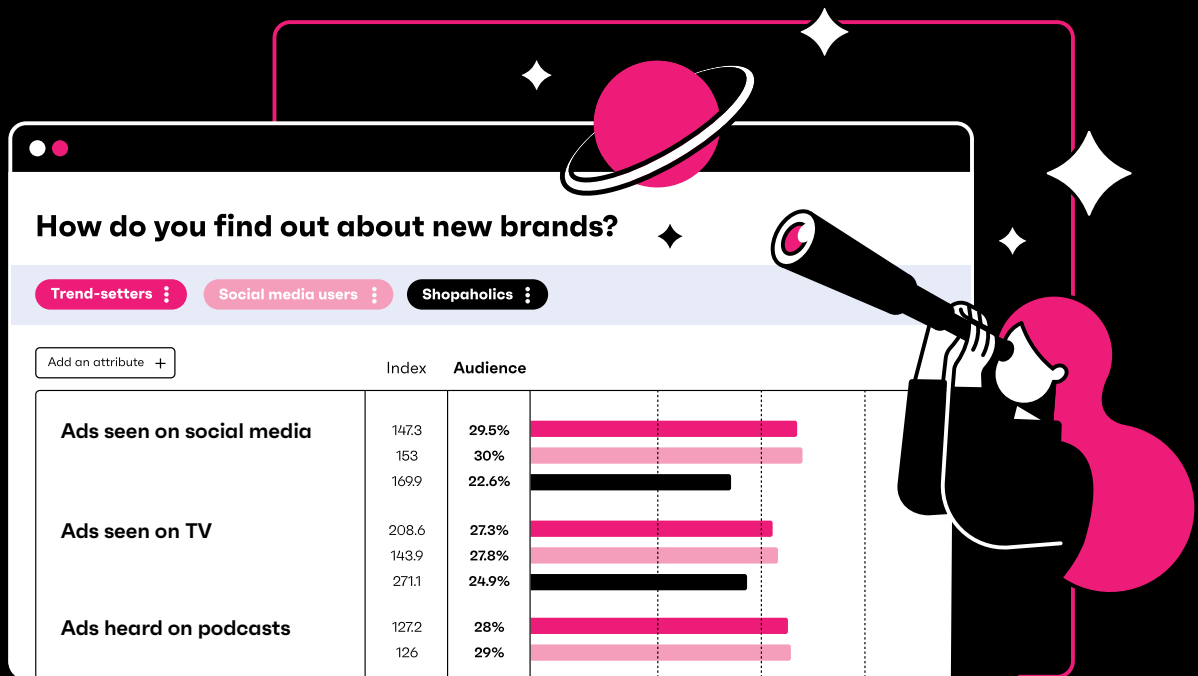
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... ad research

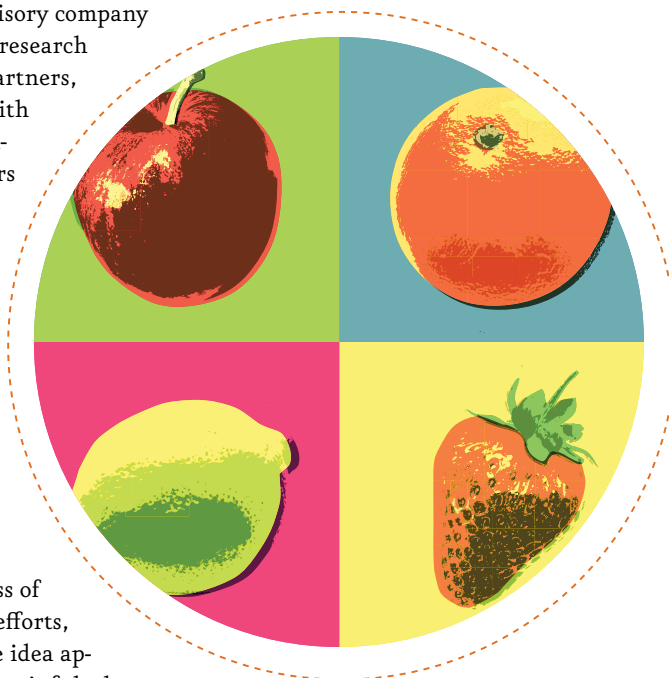
Marketers offer four metrics for ad-idea evaluation

With global advertising spending forecast to reach \$1.1 trillion this year, new research suggests that up to a third of that (\$350 billion) could be wasted due to misdirected work, as reported by the site DestinationCRM.

What's the key to breaking that cycle of disappointment? According to research, experienced marketers with at least 15 years in the industry have found success when they evaluate ideas on four key metrics: Is the idea engaging to the audience? Does the idea align with the original brief? Will the idea earn attention? Is the idea well-branded?

The research, conducted by marketing training and advisory company BetterBriefs and research agency Flood + Partners, in partnership with the World Federation of Advertisers and the Institute of Practitioners in Advertising, found that although 76 percent of marketers and 91 percent of creative agencies find strong creative ideas essential to the overall success of their marketing efforts, most describe the idea approval process as painful, slow and subjective.

Just half (52 percent) of marketers believe their feedback is clear and constructive and 30 percent of agencies agree. And just 27 percent of marketers and 30 percent of agencies feel well-trained in evaluating ideas.



... shopper insights

Loyalty as inflation-buster

As they hunt for better value in a landscape of rising prices and an uncertain economy, consumers say they intend to remain loyal to products and brands that have delivered for them in the past. More than two-thirds (68%) of loyal customers responding to a UserTesting study among 4,000 consumers across the U.S., Australia and the U.K. say they'd continue buying from their favorite brands even if prices increased. On average, consumers say they're willing to pay 25% more to stick with a brand they trust.

The research highlights a growing connection between brand trust and consumer risk tolerance. As prices rise and choices expand, people are relying on familiar brands that have earned their confidence over time, viewing them as a lower-risk investment, even when it costs more. Brand loyalists said they're willing to pay significantly more for their preferred products, particularly in gaming (up to 34% more), fitness (up to 27% more) and jewelry/watches (up to 33% more).

The top reasons for sticking with a brand include consistently high product quality (up to 60% globally), positive experiences (up to 59%) and long-term usage (up to 57%). However, customers say they'd consider switching if a competitor offered a better product (up to 44%) or if their favorite brand stopped delivering the value they expected.

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Taking an AI pulse-check

Any new technology brings with it a mixture of excitement and trepidation, both among its users and those worried that it may disrupt or diminish their lives. The current Exhibit A of that would of course be AI. With the caveat that this observation is purely anecdotal, based on conversations and sessions at our three Quirk's Events so far this year it seems like the general perception of AI is moving away from trepidation and more toward, if not enthusiasm, at least an acknowledgement of its potential benefits.

The findings from a Market Research Institute International (MRII) study released in April echo this mood. For its second annual global study, AI in Focus 2025: How Market Researchers Are Embracing and Adapting to Generative AI, MRII interviewed 426 researchers around the globe, a mix of agency/vendor respondents and corporate insights workers, and found a marked increase in AI tool utilization across both environments.

Currently, MRII found, 62 percent of survey participants report that they or their team members employ AI technologies in their professional activities, a significant increase from the previous year's figure of 40 percent. Particularly striking is the growth observed among corporate researchers, who indicated a 37 percentage point increase in AI adoption, narrowing the previously substantial gap with their agency counterparts from the prior year, when agency-based researchers exhibited twice the rate of AI utilization compared to corporate researchers.

A few other observations, as taken from the MRII press release on the study results: 77% say they feel very or mostly favorable about AI in relation to their

job and company; 71% believe AI will improve their job in the coming years. And, majorities are aware of issues such as potential bias in AI algorithms (72%), data privacy and security concerns (69%), increased dependence on AI at the expense of human judgment (63%) and ethical concerns (60%). Potential job reductions due to automation are seen as a concern to 46%, up 8 points from last year – the largest increase of any item.

Exciting to see

At least at this point, some of the AI hype certainly feels justified. Among my other duties here at Quirk's is moderating our Quirk's Virtual Sessions and our June batch (<https://www.quirks.com/articles/type/sponsored-video>) focused on DIY tools and platforms and I have to say it was exciting to see the speed, depth and quality of the outputs generated by the AI-driven data dives conducted during some of the session demonstrations.

Circling back to the mood at our Quirk's Events, much of the AI fatigue among client-side researchers was less about AI itself or its threats and more about the desperate lengths to which some vendors are going to trumpet their seat on the AI bandwagon. After not being able to put my finger on it, I finally realized that some of the AI-hawking reminded me of being at industry conferences decades ago during the rise of the internet and witnessing the mania with which vendors and agencies were rushing to add ".com" to the end of their product or company names – in many cases, only to quietly remove them after the bubble burst. (I'm not predicting the same kind of crash for AI!)

So, where does all this leave us? I'm no expert on Gartner's hype cycle




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Joe Rydholm can be reached at joe@quirks.com

framework (though I do love its nomenclature!) but I feel like we're out of the "trough of disillusionment" and on the "slope of enlightenment," perhaps with the "plateau of productivity" in the distance?

If that's the case, then this quote from a researcher in our Q Report ("Q Report respondents opine on AI, pain points and future plans" <https://bit.ly/4l65dDr>) does a nice job of capturing the current feeling:

"If you're spitting out rote tracking reports every quarter/month/etc., then AI absolutely puts your team/role at risk. But if your team is trying to synthesize and elevate a blend of primary, secondary, cultural trends, behavioral data, etc., into actionable insights for specific business needs/decisions, I think AI elevates that type of team/role. Insights and MR roles are likely going to have to evolve, but on balance, I think AI will elevate the industry. None of us got into MR/insights because we loved doing those big tracking reports! I think AI will free up many insights professionals to do more of what many of us love about being in insights – telling deep, human stories with data that will impact our respective businesses." 



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

Bruce Peoples, Consumer Insights Consultant at Peoples Marketing Insights

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

Abby Goodell, President of Fieldwork Network International



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

Cory Lebson, Principal at Lebsontech

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

Jamin Brazil, Happy Market Research Podcast Host

#facetofacemrx

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

Anne Stephenson, Partner at Explorer Research



••• advice for researchers

ASK THE EXPERT

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How Launch AI helps consumer brands grow faster by bridging the gap between consumer intent and actual purchases of new products

MANAGEMENT SUMMARY

The problem: Traditional survey-based concept testing solutions mislead brands

New product failure rates remain high because what consumers say in surveys often doesn't reflect what they do in the market. Ultimately, consumer brands end up killing many of the potential winners, allowing failing concepts to slip through.

The solution: Launch AI overcomes the say-do gap to help brands increase revenue from new products

For five years we at Cambri have been working to solve this problem with Launch AI. We combine consumer research with data science to predict real market behavior. Launch AI integrates survey KPIs, open-ended feedback and POS data to assess a product value proposition's true sales potential. Trained on survey data and real new product sales outcomes, Launch AI's machine learning models identify likely successes and failures with 81% accuracy, helping brands at least double new product sales per average store (ROS – Rate of Sales).

The evidence: How product concept testing drives in-market success (or failure)

Theoretical foundation: While strong in-market execution is essential for new product success, everything begins with the product value proposition – and that is exactly what concept testing evaluates. If the product value proposition doesn't resonate with the target audience, nothing else will matter. They won't notice the product and will overlook the marketing. Those consumers who do notice the new product regard it worse than what they already use and walk away. If you don't get the product value proposition right from the start, everything that follows is set to fail.

In-market evidence: Using POS data, we analyzed new product performance in the food and beverage sector across Europe and the U.S. The results are very clear: a new product must win within the first six months. This is when the product value proposition (product concept) carries the most weight. During this time, target consumers must regard the product as worth trying. If they don't, our data shows that the product fails.



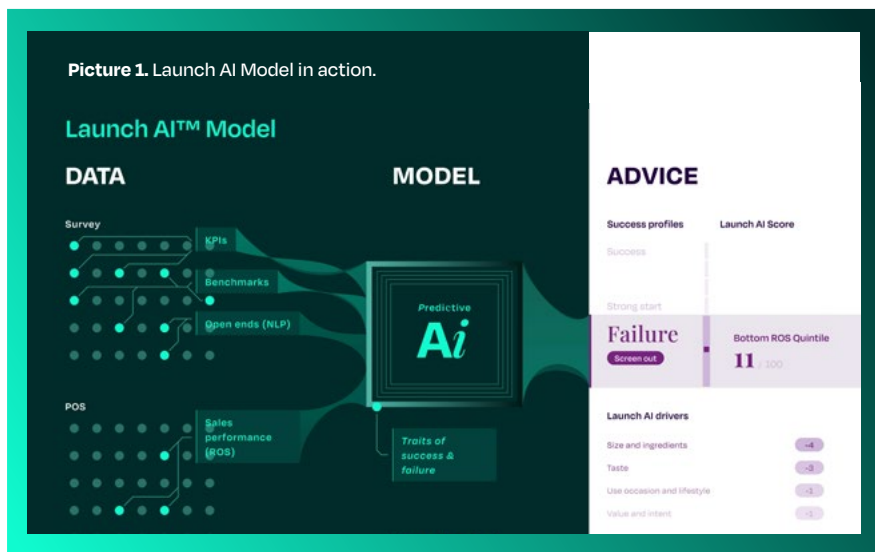
Dr. Heli Holttinen
Chief Product Officer and Co-Founder
Cambri

CAM | BRI

Problem: Traditional product concept testing paradigm stubbornly believes in what consumers say

Traditional survey-based concept testing methods rely on Likert scale questions and KPIs like purchase intent, relevance, uniqueness, believability and expensiveness. Based on KPI scores against category benchmarks, tested product concepts are classified into different profiles, indicating the size and type of in-market potential. The underlying assumption is that consumer responses predict real-world purchase behavior.

Defenders of this approach argue that it serves its purpose. Product concept



testing is meant to provide an early signal of a concept's relevance, differentiation and consumer interest to screen in/out and rank ideas. Product concept testing cannot even predict a new product's in-market success. After all, it takes place early in the innovation cycle, and so much changes after that. It is the product experience and in-market execution that ultimately determine success!

These arguments are convenient shortcuts reflecting intellectual laziness. The fact is, the traditional concept testing method was born decades ago before the era of machine learning, AI and integrated data. They rely on quantitative survey data and traditional statistical methods solely because that was all the research industry had access to.

Sticking with outdated beliefs and methods prevents consumer brands from unlocking the full growth potential of new products.

Solution: Launch AI predicts a product concept's sales potential by using integrated data

Survey data feeding machine learning model:

Launch AI combines consumer feedback from both closed-ended KPIs and open-ended responses, enhancing the accuracy of sales potential predictions and uncovering the key drivers of product success and failure. It uses Likert scale questions to capture high-level reactions, while proprietary natural language processing (NLP) models analyze deeper insights from open-ended responses. Our NLP taxonomy covers themes proven to influence consumer decisions.

Machine learning model using POS data:

By using POS data we analyze how well new products performed against the rest of the category. The outputs of our standardized product performance analysis feed into the Launch AI model. Our focus is on the first six months after launch so that the Launch AI model can capture, isolate and evaluate the impact of product value proposition (concept)

on new product in-market success. The role of the product value proposition (concept) is to generate product trials while product experience aims to generate repurchase.

Measurable business impact delivered

Eighty-one percent accuracy of screening in likely successes and screening out failures: We monitor the accuracy of each LAI model version using a validation product dataset of both survey data and POS data. Model accuracy is assessed by comparing actual in-market performance with the Launch AI model's predictions for the same product concepts. The latest Launch AI model version achieved an accuracy of 81%.

Launch AI helps double new product sales per store: By identifying failures at 80% accuracy and successes at 83% accuracy it helps to at least double product sales per average store (ROS).

Actionable advice to screen in/out, rank and refine

Success Profile and Launch AI Score:

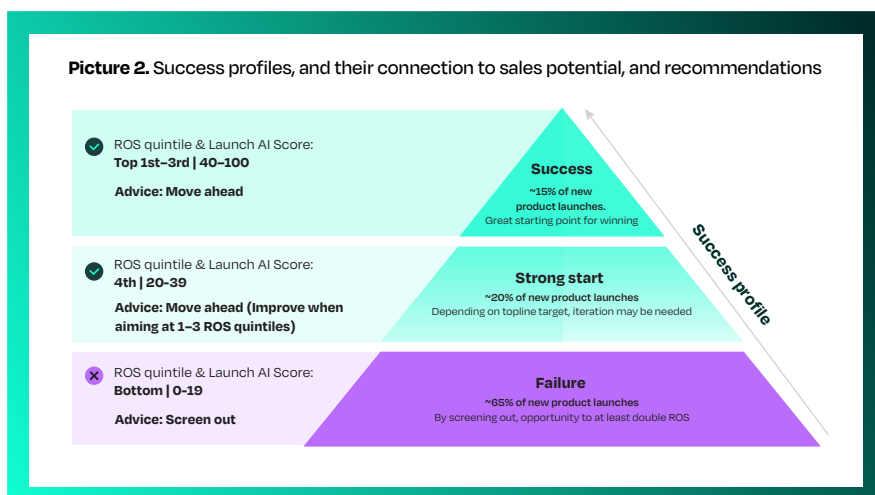
Success Profiles help to screen in and out concepts while Launch AI Score (0-100) helps to rank them. Concepts are classified, based on their predicted weighted rate of sale (ROS):

- **Success:** Recommended for screening in. Only 15% of new products achieve this.
- **Strong start:** Concepts showing potential but requiring iteration, based on sales targets.
- **Failure:** Recommended for screening out. Sixty-five percent of new products fall into this category.

Launch AI drivers: They help to identify areas that have the biggest impact on in-market success. Launch AI reports 10 drivers providing:

- Impact of each driver on the Launch AI Score (in % points).
- AI summary of key positives and negatives.
- Easy access to raw open-ended responses to validate consumer feedback.
- GenAI-generated new product value propositions based on consumer feedback.

Curious to dive deeper? Access an example data set and insights in our e-book: www.cambri.io/resources/ai-outperforms-traditional-benchmarks



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Meet some of the influential women who are driving change and innovation in the marketing research and insights industry! These women are rising through the ranks because of their ability to push research and insights to be better. Their dedication and expertise are elevating the industry and advancing techniques of the trade.



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TALK SHOPPE

Talk Shoppe is an Ogilvy Award-winning, women-owned and minority-owned consumer research agency led by visionary partners Liana Morgado and Ruth Behr. After more than a decade navigating the rigid, one-size-fits-



all world of consumer insights, they launched Talk Shoppe to champion a more intentional, human-centered approach to research.

Fifteen years later, the company is renowned for innovative and tailored qualitative and quantitative solutions, aimed at connecting brands with people and uncovering meaningful human truths. With a diverse team of researchers from varied academic and social backgrounds, Talk Shoppe merges deep industry expertise with

fresh perspectives on consumer behavior and cultural trends.

Here we believe that radical empathy with clients and consumers, thoughtful analysis and an obsession with detail are the foundation of truly impactful insights. Whether it's creative testing, market-

ing effectiveness, market sizing, brand positioning, brand health tracking, segmentation or competitive analysis. Talk Shoppe acts as a true extension of your team, bringing heart and clarity to every project and proving that research, when done right, can not only inform but inspire.

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FOUNDER, LLMQ CROSSTAB SOLUTIONS

When the data's complicated – and the stakes are high – you want Lanna on your team. Lanna Lee Maheux-Quinn is the powerhouse behind LLMQ Crosstab Solutions, a U.S.-based



business bringing more than 15 years of experience in market research and quantitative data processing. Known for precision and deep expertise, her work elevates research outcomes and drives confident decision-making.

Lanna doesn't just run tabs – she thinks with you. She flags issues before they become problems, translates ambiguity into action and turns messy data into clean, trusted outputs. Her work is a safeguard for quality and a catalyst for insight.

Past clients praise her problem-solving mind-set, commitment to quality and knack for organizing even the most complex datasets with clarity. From kickoff to delivery, she stays engaged, thinks critically through each phase and helps teams avoid pitfalls before they arise. Along with clean, accurate data, clients get a strategic ally who's committed to making every project better.

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Tiffany is COO wearing many hats. She serves as Susan's right hand and

manages a multifunctional recruiting team and a host of project managers. Elisa is VP of health care. Rexann serves as our health care department lead. Rosslyn heads up a consumer team and has worked with Susan for over 10 years. Judy has worked with Susan for 21 years and she handles in-facility liaison work as EVP. Robyn has been promoted to senior project manager and she hosts a team of recruiters. Bianca has been with MHN for

eight years and is VP of consumer services with a team of recruiters. She has been with MHN since she was 16, working as a part-time recruiter in high school. 2025 brought MHN Susan Stears who has over 20 years on the client side in the market research industry.

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Innovating research: Ali Henriques and Qualtrics Edge's bold vision

ALI HENRIQUES

GLOBAL DIRECTOR OF QUALTRICS
EDGE, QUALTRICS

For Ali Henriques, global director of Qualtrics Edge, research isn't just a profession; it's a lifelong passion. "Research is all I've ever done," she shares, reflecting on a multifaceted career that began in the cruise line industry, where she honed her skills as a client-side researcher and certified moderator. This deep, client-centric foundation fuels her transformative work at Qualtrics.



Today, Ali spearheads Qualtrics Edge, an innovative division she describes as an "in-house incubation agency." Formerly known as Research Services, Edge embodies a crucial crossroads: honoring traditional research rigor while fearlessly imagining its future. Her diverse team, including ex-agency, client-side researchers, along with data scientists, evolves solutions for market demands, particularly in an AI-driven landscape. It serves as a full-service research agency, incubating and developing next-gen insights tools for evolving market demands.

stakeholders with immediate access to critical data. Qualtrics Edge's flagship Edge Audiences solution, deploying advanced AI to simulate consumer behavior, is central to this. It unlocks the ability to explore "counterfactuals" and pre-test concepts in a low-risk environment, ensuring that multimillion-dollar decisions are informed and agile.

Crucially, Ali stresses that this AI evolution isn't about dehumanizing research. "Humans remain at the core," she affirms, aligning with Qualtrics' ethos to "make business more human." This includes continuous "hydration" of synthetic models with human panelists, ensuring relevance and accuracy. She envisions a future where qualitative and quantitative methods collide, where researchers can "have a conversation" with synthetic segments and where insights are delivered faster, leading directly to action. She anticipates a shift from traditional record-level data to trusted AI answers, driving swifter, more actionable insights. Ali Henriques isn't just adapting to the future of research; she's passionately building it.

Ali's vision for market research is bold: "We're democratizing insights," she states, emphasizing a shift from serving "insights buyers" to empowering the "insights consumer" – the marketers, operators and product teams. The goal is to accelerate speed-to-insight, breaking free from weeks-long waits that compromise quality. Recognizing that traditional methods often face resource constraints, Edge empowers

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*Built on insight.
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CAROLINE BRETHENOUX

MANAGING DIRECTOR, HUMAN DOT PLUS AND CHIEF STRATEGY OFFICER, CULTURE+ GROUP

Caroline Brethenoux is a globally recognized strategist and data storyteller dedicated to driving inclusive growth through the power of cultural



intelligence. With over 20 years of experience across Asia, Europe and the U.S., she's led Fortune 500 companies through transformative strategies rooted in human insight.

As chief strategy officer at the Culture+ Group, which includes Cien+ and Human Dot Plus, Caroline developed the Human Co™ framework, a strategic

approach blending empathy, behavioral psychology, AI and design to create impact. Under her leadership, Human Dot Plus has partnered with Fortune 500 companies like J&J, Novartis, Merck, GSK, NFL, Amex, Kellanova and Prudential to build more meaningful brand experiences.

Caroline's expertise fuels innovation in market research, agile brand design and company culture transformation. She holds degrees from the Université Paris-Sorbonne and HEC Paris and completed a business analytics program at the Wharton School.

With purpose-driven leadership, Caroline is redefining how brands connect with people to drive measurable societal and business outcomes.

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*Mastering the
message: How Patti
Wojnicz turns
insights into action*

PATTI WOJNICZ

EXECUTIVE VICE PRESIDENT,
P&K RESEARCH



Patti Wojnicz is a seasoned consumer insights leader with over two decades of experience guiding Fortune 100 CPG companies through the product life cycle – from ideation to

brand maintenance. As executive vice president at P&K Research, she leads client services and operations, delivering actionable insights through data storytelling and advanced analytics. Patti brings deep expertise across diverse categories including food, beverage, personal care and household goods, with a proven track record in both domestic and global markets. She is known for her consultative approach to research design and statistical analysis, as well as her ability to mentor teams and present complex findings in an engaging, accessible way. A frequent industry speaker at conferences such as SSP, Pangborn and EuroSense, Patti is passionate about elevating research impact through clarity, collaboration and continuous learning.

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●●● education research

Grading out life after college

Recent graduates list successes and regrets

Nine in 10 recent college graduates had a positive college experience, and 84% maintain a positive outlook on their lives overall, according to a Sallie Mae and Ipsos study. Eighty-two percent of recent graduates are employed with 74% working in a field related to their degree. Just 14% of recent graduates say they feel unsuccessful after college.

Some recent graduates say the most valuable parts from their college experiences were the intangible benefits of higher education including becoming more independent (45%), developing critical thinking and problem-solving skills (40%), exploring personal interests and growth opportunities (31%) and broadening their perspectives (21%). Others highlight the practical aspects of higher education as most valuable, such as academic learning and coursework (42%), building personal and professional relationships (20%), gaining work or internship experience (25%), experiencing campus life (21%) and participating in extracurricular activities or clubs (13%).

Eighty-five percent of recent graduates feel successful with the amount of time and effort they put into academics, 84% say they had at least one professor who truly cared about their success and 78% believe their college was supportive of their academic and social needs. Thirty-five percent regret not spending

enough time socializing or building relationships and 64% regret not taking full advantage of the college experience and resources. Twenty-eight percent wish they could change some of their choices with 18% saying they would have chosen a different major.

When it comes to family relationships, 91% of grads who left school three to five years ago rate it as excellent, very good or good vs. 84% of grads who left zero to two years ago. Living situations (49%), prospects for future career (44%), romantic relationships (43%), prospects for future income (42%) and social life and friendships (41%) are rated as excellent/very good.

Recent graduates view success as achieving a balance between life and career. Financial health is the top indicator of success, cited by 46% of graduates, followed by mental health (36%) and career prospects (30%). While 70% of recent college graduates rate their mental health positively, it is also one of the top areas they want to improve (40%).

Seven in 10 agree that education was worth the cost. Of the 47% of recent graduates who borrowed to help pay for school, 75% say they are confident in their ability to repay their student loans. Nearly half of recent graduates (48%) say they follow a budget and 94% are pursuing at least one near-term fi-

nancial goal including saving for retirement (47%), saving for a major purchase (44%) or building an emergency fund (37%).

Seventy-five percent of those who developed a plan for how to pay for all years of college before enrolling report they feel successful, compared to 54% of non-planners. Just 37% of recent graduates used their school's career resources and of those who did, 82% secured a first job in their field of study.

Most recent graduates worked while in school. Eight in 10 (83%) worked in some capacity during their college career. Nearly half (47%) held an off-campus job, 31% worked on campus and 29% had an internship. Graduates who had an internship while in college were more likely to be employed in their field of study and feel very successful after graduation.

As methods of self-care, 64% enjoy watching TV or movies, 60% enjoy spending time with friends or family, 48% browse social media, 47% play video games, 44% exercise and 37% spend time outdoors.

The study reports the results of Ipsos' online interviews of 1,045 young adults who graduated college with an undergraduate degree between 2019 and 2024. The research was conducted between December 13, 2024, and January 9, 2025.

... leisure research Great interest in the great outdoors

Discovering the joys of camping

Over 80 million Americans camped in 2024, with 5.8 million making their camping debut, found a survey conducted by Toyota Trucks and camping app The Dyr. Since 2021, more than 25 million Americans have gone camping for the first time, an increase of 18.5 million from 2021.

Four out of five American adults have gone camping at least once. Forty-five percent of those 18-34 say their interest in camping has increased in the last decade and three out of 10 adults who camped for the first time in 2024 were under 35. Thirty-one percent of the overall camper population

identify as BIPOC and 12% identify as LGBTQ+.

Four out of five say inflation either caused them to camp more or did not affect their camping activities. Seventy-three percent of respondents say they camp with their partner, 39% camp with friends and 31% bring their children. Respondents also report camping with horses, rabbits, parrots, bearded dragons and fish but the most common animals were dogs (50%) and cats (5%). More than half (60%) of 18-34-year-olds prefer tent camping and camping with friends (58%).

Fifty-nine percent of campers used all their campsite reservations in 2023 and that number rose to 71% last year. But finding an available campsite to book continues to be a major challenge. From 2019 to 2022, the number of campers who reported difficulty finding a campsite to book rose from 11% to 58%. After falling to 46% in 2023, it bounced back to 56% in 2024.

While many view camping as a vacation or as a way to be off-grid, 22% of 18-34-year-olds, 33% of 35-54-year-olds and 22% of campers 55+ are likely to work while camping. Those 55+ have made after retirement camping plans with many saying they will visit national parks (79%), try open-road exploration (74%) and free camping (64%). Thirty percent plan to take a camping trip with grandkids.

Solo camping is on a steady incline. Many say they enjoy the solitude (69%) or go alone because friends and family are not always available (51%). Others enjoy last-minute trips (28%) and camp as a part of a larger solo trip (26%).

This report is based on a representative sample of 1,000 U.S. residents in a survey administered by E2E Research Services in October 2024 and surveys of over 5,000 users of The Dyr in October and November 2024.

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... gaming research

Not really free-to-play

Gamers allocating more money to in-game purchases

Gaming is continuing to surge in popularity as new trends and technologies are reshaping the landscape. Research firm KS&R found that microtransactions are on the rise and games are making large profits from small spends. Thirty percent of 18-41-year-old gamers have recently purchased in-game content such as skins, battle passes and XP boosts while playing free-to-play games. These frequent, small purchases are becoming a cornerstone of gaming monetization strategies, transforming how developers and publishers think about revenue generation. Many players now view these purchases as a regular part of their entertainment budget, and as gamers allocate more money to in-game purchases, there may be a corresponding decrease in spending on other forms of entertainment.

Augmented reality (AR) games, which offer immersive and interactive gaming experiences, are becoming more well-known. Among 13-17-year-old gamers who own virtual reality headsets, 51% are using them for simulation games. However, nearly four in 10 (39%) of 18-41-year-old gamers are still not familiar with these gaming options. Forty percent of those who learn about AR games say that they would enjoy playing them.

Online gaming is a deeply social activity, and player conversations while gaming are now a core part of the experience. Through voice, text and video chat, players connect, strategize and build communities. Overall, more than half of gamers engage in virtual conversations while playing, and engagement is even higher among younger gamers. Seventy-seven percent of 13-17-year-

olds, 76% of 18-25-year-olds, 61% of 26-41-year-olds, 32% of 42-57-year-olds and 18% of 58-76-year-olds say they engage in social conversations with others while gaming. There is a clear demand for specialized communication tools for the gaming community. Discord has become popular for gaming chats but many players still use more general apps such as FaceTime.

KS&R conducted a nationwide survey of 3,650 consumers ages 13-76 to explore how gamer preferences are evolving and identify the biggest emerging opportunities in the gaming industry.

... financial research

From soft saving to loud budgeting

Turning to social media for advice

There has been a generational shift in financial education, with younger consumers, particularly Gen Z, increasingly turning to social media for financial tips and education, while older generations more heavily rely on traditional sources like family and banking institutions, finds Spruce, the mobile banking app built by H&R Block. Traditional sources of financial education are being supplemented – and in some cases, supplanted – by newer sources, often on platforms where the origin or the validity of the guidance may not be clear.

Parents and banking institutions remain the most common sources of financial education. While the landscape is evolving, key findings highlight a critical gap in formal education. Thirty-one percent of respondents cite family members as the main source for financial guidance, 29% turn to banks and only 13% reported learning about personal finance in school.

Social media has become a popular source of financial information, particularly among younger generations, with 16% of all respondents looking to

it for financial education. Gen Z leads the charge as 33% note that they look to social media for financial education with Millennials following closely behind at 23%.

Viral trends including soft saving, loud budgeting and cash stuffing have played a significant role in shaping financial behaviors with 37% of respondents admitting they have been swayed by social media and have tried a finance trend they discovered online. The influence of these trends varies dramatically across generations with Gen Z impacted the most at 68%. Over half (51%) of Millennials and 27% of Gen X cite being inspired to try social media finance trends and while not as likely as other generations, 12% of Baby Boomers still noted being influenced to partake in a financial trend.

Among the platforms driving this shift, TikTok (39%) and Instagram (34%) are the most popular sources of financial information for Gen Z, followed by Facebook (23%) and even podcasts (17%), highlighting the growing impact of digital content on personal finance decisions, particularly among younger generations.

Online financial tools and apps have become essential for money management, with Millennials and Gen Z being the most likely to utilize them for everyday matters such as keeping track of a budget, planning or establishing savings. Credit score monitoring emerged as the most common use case among respondents (38%). Budgeting was cited as a key priority, with 29% of respondents using financial tools or apps to track their expenses.

Reliance on digital financial tools extends beyond convenience. Confidence in making major financial decisions is bolstered by online tools or apps. Sixty-six percent of Gen Z share that they are not confident or only somewhat confident in making large decisions without digital assistance.

Research was conducted with Morning Consult via online research on the omnibus fielded in March 2025 among a national sample of 2,200 adults.

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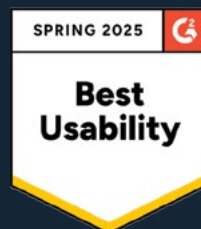
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... employee research

Workplace challenges

Mental health stigma persists

While mental health challenges among employees vary in degree, the problem is widespread. The vast majority (90%) of U.S. workers experienced some level of a mental health challenge – most commonly burnout, depression and anxiety, finds nonprofit organization Mind Share Partners.

Over half experienced moderate to severe levels of burnout (53%), depression (53%) or anxiety (50%). Others say they experienced minor to severe levels of burnout (76%), depression (72%) and anxiety (70%). People pointed to U.S. politics (43%), global events (42%) and personal finances (37%) as top stressors. Ninety percent of U.S. workers report-

ed at least minor levels of one mental health challenge and 53% of challenges lasted at least two months up to an entire year.

The good news: Investing in mental health pays off in employee health care costs and retention. Employees who work at a company that supports their mental health are twice as likely to report they didn't experience burnout and depression. They're also three times more likely to trust their company and intend to stay there for two years or longer. Forty-eight percent have left jobs for mental health reasons and 57% say a company supporting mental health is "very" or "extremely important" when job searching.

Stigma in the workplace remains high. Forty-six percent worry about losing their job if they were to talk about their mental health at work. While half are comfortable talking about their mental health in the workplace, half wish they could talk more openly about it. Sixty-seven percent of workers have

talked about their own mental health at work in the past year, 41% have spoken about it in the past month and 60% say they got a positive response. Workers feel comfortable speaking about their mental health with colleagues (52%), their manager (52%), someone in HR (48%), senior leaders at their company (47%) and their CEO (46%).

Sixty-three percent say work positively impacts their mental health while 39% say it negatively affects them. Over half of respondents (59%) believe their company supports their mental health, 58% say their leadership advocates for mental health at work, 57% say their manager checks in regularly about their well-being and 64% believe their manager could support them if they have a mental health challenge.

In partnership with Qualtrics, Mind Share Partners surveyed 1,153 full-time employees from March 20-April 15, 2025.

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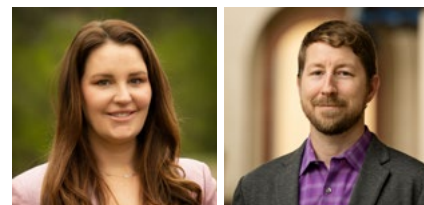
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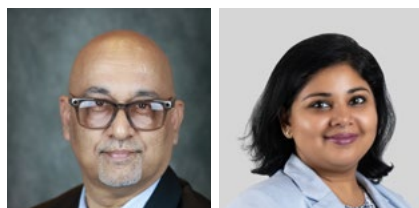
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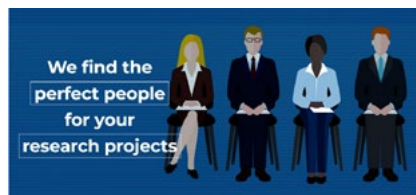
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Jason Gamber, Senior Vice President

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SIS International Research

Founded 1984 | 50 employees
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Founded 1991 | 40 employees
Aaron Burch, CEO and Co-founder

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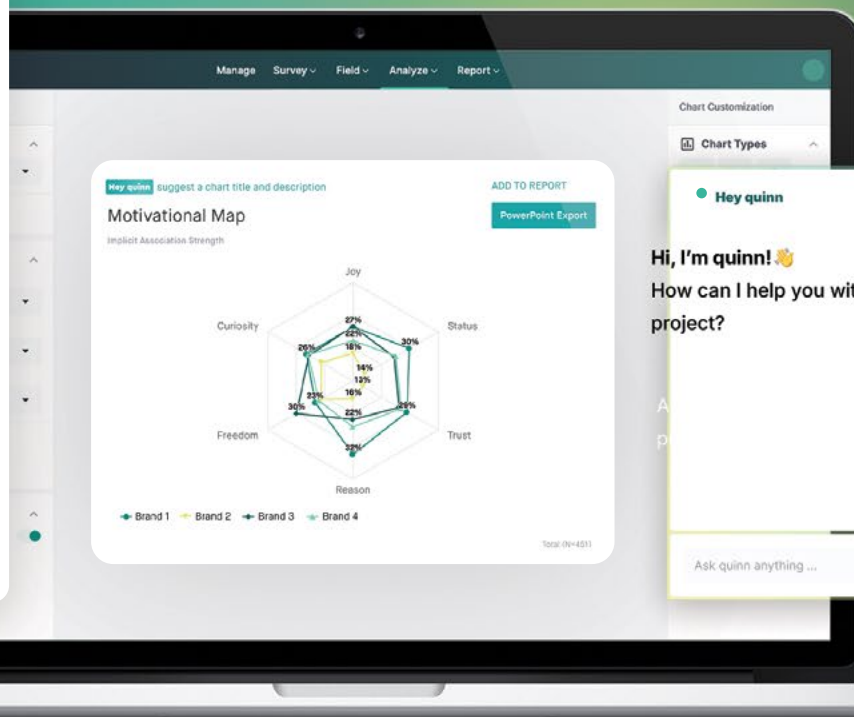




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What poverty in Germany means for marketers and researchers

| By Edward Appleton

abstract

Edward Appleton explores the impact and causes of Germany's stagnant economy.

A few years ago, if you suggested that Germany was a poor country, you would have been laughed at, ridiculed. It could maybe be true at the margins, restricted to certain segments (old people, children), but the mainstream? No way.

Well, things are changing, and not for the better.

Germany is losing its claim to being a wealthy country, the “powerhouse of Europe.”

The infrastructure is creaking, as anyone travelling by Deutsche Bahn will testify to. Pension and health care systems are both on the edge financially. Germany's demographics are challenging the country's once-solid social-market-based economy. Digitalization is also an area where Germany is lagging.

Travel through any of the more forgotten areas of Germany – the Ruhrgebiet, for example – and it becomes more tangible. Boarded-up buildings adorned with graffiti. Empty shops. Abandoned sports grounds.

But it's not just the structurally challenged areas. You don't have to

travel far on the S Bahn in richer conurbations such as Munich, Berlin or Hamburg to see similar problems. Lots of housing stock from the 1950s – grey, unrenovated, graffiti-adorned. To paraphrase a quip used by the once-feted mayor of Berlin: “Poor but not sexy.” From the perspective of someone who has lived and worked in Germany for about 35 years, it's sad.

And while the German state still has a lower debt level as a percentage of GDP than, say, France, the U.K. or the U.S., impoverishment is very much present at both a personal and municipal level.

Unemployment figures hit a 10-year high in Q1 2025, with 3 million registering as unemployed. Surveys from specialist agency IAB (Institut für Arbeit und Berufsforschung) suggest that it will get worse in the coming months.

The number of companies declaring bankruptcy has reached the highest level since the financial crisis of 2008-2009.

In 2024, 22,400 companies went bust in Germany, an increase of approximately 25% versus the previous year, according to the credit specialist company Credit Reform (Credit Reform - Insolvenzencrisis 2024).

More worrying, the number of larger companies employing over 250 people declaring bankruptcy rose a massive 44% versus the previous year.

This has a serious knock-on effect on communities, financially and otherwise, reducing the tax base and impacting on all sorts of social, cultural aspects. Think local municipal swimming

pools, or hotels/restaurants dependent on business customers.

Deindustrialization is currently haunting Germany. The percentage of industry jobs considering shifting plants and operations to geographies outside of Germany (likely with lower costs) has shifted radically higher over the past three years: 21% said they were considering moving abroad in 2022, rising to 37% in 2024 according to regular surveys conducted by the DIHK (Deutsche Industrie und Handelskammer).

Energy costs are a massive concern, alongside a perceived out-of-control bureaucracy.

Confidence levels amongst the population are also extremely low – the Consumer Confidence Index measured by GfK/NIM in February 2025 was at minus -22. It has barely recovered since the pandemic – and a long way from the pre-COVID-19 level of +10.

Roughly one in four Germans have no savings whatsoever, according to a survey carried out by ING Direktbank, sampling 1,000 Germans in December 2023. In a comparison with 12 other European countries from 2019, Germany had the second-highest percentage stating they had zero savings – the U.K. being ranked number 10, France number 9. (Source: ING Savings Study 2019.)

But it's not just the lowest income-level groups that are affected. Poverty is a palpable mind-set that is spreading upwards, impacting those with disposable income, encouraging them to save, not to spend. For those involved in trying to sell goods, cars and houses,

it's a problem, with price promotions seemingly the only marketing activity that really works, creating a downward spiral.

Change however might be in the offing. Three main reasons worth highlighting:

- There is a new German government expected, CDU/CSU-led, with a focus (amongst other things) on growth, jobs and the economy. The need for urgent action is clear; a mandate has been given.
- There could well be an influx of governmental investment into the economy – the so-called “brake on debt” has been removed. This could result in a boost for consumption, however long the lag effect may be – and a corresponding confidence boost.
- The vibe from the U.S. is shifting in many ways. Like it or not – and many in Europe seemingly do not – the impact of this will hit all European countries, forcing them to wake

up. A threat? See it as an opportunity, perhaps. Yesterday's obsessions may not be the ones to guide a future road map.

But for the mood music to change broadly there will need to be a huge and sustained effort, economic and political, to counter the fatalistic what-can-you-do-about-it? attitude which one so often encounters in German everyday life.

What, if anything, can marketing – or even we humble market researchers – do to help? The topic of a whole different article, so I will limit myself to three common calls to action:

- Listen to all voices, help ensure that all get an equal weighting in research – for example, older age cohorts or those living outside of heavily urbanized areas. Ignore your prejudicial or judgmental viewpoints – something seemingly hard for many in the social sciences or advertising community to do.

- Help brands and companies get back to their true north – the problems they solve in people's lives. Stress how and where higher-level benefits such as sustainability contrast in a need hierarchy with the most important drivers. For chocolate, for example, get the balance right between immediacy, taste enjoyment and other holistic concerns.
- Innovate or encourage innovation – in thinking, approaches, offerings, products. A sense of mental renewal, a sense of openness, liberation even, often comes by seeing and trying something different. (Not to sound like Tony Robbins!)

Change is indeed needed in Germany. Here's hoping for an imminent upswing and shift in direction. The country deserves it. 🇩🇪

Edward Appleton is founder of A.I. Appleton Insights and can be reached at eappleton90@googlemail.com.



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Data quality past, present and future

| By Tom Burdick

abstract

B2B researchers can improve data quality by using realistic incentives for executives, designing intelligent screeners, keeping surveys short and utilizing fraud detection software.

W

hen I first started out in the market research industry in the late 1990s we collected all of our data using pencil-and-paper surveys, which were packaged in large boxes and mailed out to our executive interviewers. They were used to collect data for high-level financial consulting which was used to rate institutional investors, plan sponsors and banking executives, among others. The ratings impacted these financial professionals' compensation and bonuses, so data quality and accuracy were critical.

Back then, the task of printing the thousands of color-coded questionnaires, bank lists and supporting materials and then packing the boxes for shipments sent around the world was physical and tedious work. The executive interviewers who scheduled and administered each interview were critical for ensuring they spoke to the correct respondents and collected accurate and reliable data. There was little doubt about the authenticity of the respondent or the data they were providing. But it was expensive and time-consuming from start to finish. Fast-forward 30 years and much has changed in terms of how data is collected, but the importance of high-quality, accurate data is as important as ever.

Because the go-to methodology for data collection has changed dramatically since the pencil-and-paper days (and especially over the last decade), the biggest challenge we face in 2025 is trusting the authenticity of the respondents in our dataset. This is especially true with regard to B2B research. Online methods have eliminated the built-in principal validation mechanisms of in-person (and to some degree, phone methodologies). The ease of joining and the ubiquity of online panels has lowered trust and fueled an entire sub-industry of data quality fraud detection platforms and software. They can detect bots, mismatched geography, duplicate entries, keystroke anomalies, AI-generated open-ends and much more! The funny thing though, is that data quality seems to be only getting worse. That's not to say these tools aren't important to the data quality landscape. They have some limitations and can't always stop intentional fraud (hello Op4G).

Fighting data fraud and providing high-quality online data is the most important issue the market research industry is facing today. And as I've written previously, good online data quality takes a community approach ("Data fraud: A threat to market research," Quirk's e-newsletter, May 5, 2025). All is not lost. I'm hopeful that this community approach, with key stakeholders involved, and the continued introduction of new technologies will ultimately prevail. In the meantime, let's highlight a

few things that we can all do now to improve the likelihood of collecting reliable, good-quality data.

- Stop expecting that VP- and C-level B2B executives are going to participate in your survey for \$20 CPIs and it's going to yield quality responses. After the panels take their cut and prices are marked-up, how much do you think the incentive going to the respondent really is? \$5? \$10? That is just not going to move the needle for these busy professionals making six-to-seven-figure salaries. If you are trying to get CEOs at enterprise-size companies for \$20, that should raise suspicions. But completing interviews with them at that rate should be considered Defcon 1 for your research.
- If budgets and timelines allow, don't be afraid to use telephone for your data collection. It exponentially increases the likelihood that the right person is answering your survey and a well-trained interviewer can deliver better data than a self-administered online survey. This human element can't be replicated online.
- Stop with the poorly designed screeners that telegraph to the respondents how to qualify, basically escorting fraudsters right into the survey by making it obvious what the topic is. Construct an intelligent screener that disguises who you want to interview, thus increasing the chances that only qualified respondents make it in and not those just trying to earn an incentive.
- Stop with the long and repetitive surveys that take too much time for busy professionals to complete and that ask the same questions over and over again. Convince your clients that they can get the most important data within 15 minutes. Shorter surveys lead to better conversion rates, fewer dropouts and higher-quality data. Then implement techniques within the survey to identify and terminate fraudulent respondents.
- Do utilize fraud detection software, both before respondents hit your link and within the survey itself, to detect and block things like bots, automation software, duplicate devices, duplicate IP addresses, location mismatches and other distinctive rogue issues.
- Do use multiple sample sources on

each project to reduce the risk of a single source tainting the results. Multiple sources improve the speed, reduce bias and allow for more flexible and proactive sampling (i.e., remove/replace bad apples). Reputable sample aggregators can accomplish this very effectively.

- Do make sure you are using an experienced and knowledgeable field manager/field team who can often help save a project from disaster due to poor design, technical issues or the like. The industry seems awash with young field project managers, who although well-meaning, often lack the experience needed to proactively identify red flags and take quick corrective actions.
- Always do a soft launch and then thoroughly review the data to make sure areas like the survey logic, brand awareness, revenues, etc., are all making sense. Look for fraudulent responses and tell the field team so they can remove the source. Do not wait until the end to review data. Anomalies or irregularities in the data can most effectively be addressed before fully launching a study so that the foundation is stable. Waiting to the end only creates stress and delays for all parties involved.

Reduce the potential for disaster

While these actions won't always solve the problem of poor data quality and fraud, together they help move things in the right direction and reduce the potential for disaster. Being diligent and realistic about project specs and expectations will also help. Construct your survey with fraudulent actors and lazy respondents in mind so your foundation is strong. Use common sense. If you want high-quality data, expect to pay for it. The other alternative is to go back to the quaint world of pencil-and-paper surveys for face-to-face interviewing. Not me! I'm happy to leave the 1990s in the past where they belong – although I still enjoy watching reruns of “Friends” and “Seinfeld”! 📺

Tom Burdick is vice president at Eleven Market Research. He can be reached at tom@elevenmr.com.

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DIVIDE TO CONQUER

HOW TO UNLEASH THE POWER OF SEGMENTATION

By Kyle Rawn and Lindsay Roberts

Based on data from its call center, a warranty company thought its market was predominantly female. However, when that company commissioned marketing research, it found that its customer base was actually largely male. While the family members responsible for maintaining the warranty were typically female, those who made the decision to purchase the warranty in the first place were typically male. This information led the company to abandon plans for a major marketing campaign targeting women – which, it now understands, was not warranted and would not have been effective.

How was that possible? Segmentation! Segmentation is the process of dividing a customer base into distinct groups that share common characteristics or behaviors. It relies on advanced analytics to identify patterns within consumer data, ranging from psychographic and demographic attributes to behavioral and transactional indicators. Using statistical modeling and clustering algorithms, segmentation sorts through this data, moving beyond basic categorization to unveil nuanced consumer personas that drive strategic decision-making. This enables businesses to tailor their marketing, product develop-

ment and engagement more effectively to specific consumer groups.

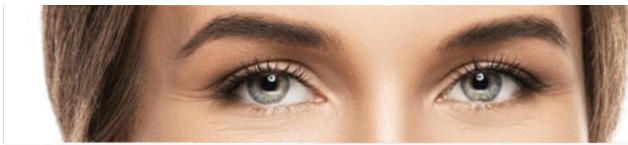
For organizations, a segmentation project offers several unique advantages for targeting existing consumers. More thoroughly understanding consumers means identifying ongoing pain points. For example, if a segment prefers to use a mobile app to engage with the company rather than calling, then offering a mobile app can increase brand loyalty, make customers feel valued and drive higher Net Promoter Scores or word-of-mouth advertising.

Segmentation also sharpens your approach to acquiring new consumers. Understanding what messaging might convert consumers to your organization is only one part of getting new business; the whole picture also involves understanding the channels through which potential consumers might convert. For example, if your customers tend to convert online, you may put more money into your web presence and reduce costly brick-and-mortar stores. Matching your consumers' preferences and expectations to the right channel proportions can significantly enhance engagement, reduce friction in the purchasing journey and increase overall ROI by increasing revenues and decreasing costs.

NOT THE SAME

At its most basic level, segmentation relies on one fact: Your consumers are not the same. Consumers within a market can vary in terms of their attitudes, behaviors and demographics but also differ in what messages might be most important and how you might reach them. Different groups of consumers within a given space or segment may also be more or less profitable than others for your organization.

Defining different consumer segments within a given space based on shared characteristics is one of the ways to keep your organization relevant and moving forward. The same things that make consumer segments unique will determine your marketing strategy. If your company provides a large portion of its products or services to college students, taking out ads in a print newspaper is likely frivolous. Likewise, if your highest-paying consumer segment prefers to listen to the radio, ads on a music streaming service are probably not the best way to reach them. To understand how to reach, convince and ultimately gain consumers, you need to understand what they value, why they purchase, who they are, when they can be convinced and where to reach them.



TIP #1

USE VALIDATED SCALES WHERE APPLICABLE AND CONSIDER SEGMENTING BY ACTUAL BEHAVIOR RATHER THAN JUST INTENT.

The information you want will guide the types of questions that are asked, which will then determine the insights you are able to glean from these consumers. Psychographic questions should explore motivations, values and preferences without leading respondents. Behavioral segmentation benefits from self-reported habits and purchasing patterns, which you should cross-validate whenever possible. Demographic questions should be specific to allow for meaningful comparisons. Geographic and firmographic data should account for regional nuances in consumer behavior and business needs. Regardless of the data being collected, it is imperative to collect data accurately and ethically.

Ensuring data quality requires you to take a strategic approach to question design and survey length. Avoid questions that apply only to small subsets of consumers, as this can lead to gaps in data and limit the ability to analyze broader market trends. Instead, use follow-up questions selectively, reserving them for areas where deeper insights will meaningfully impact segmentation. It is tempting to ask every possible question but overloading respondents with too many questions can result in lower-quality data and reduced engagement. Moreover, questions with large amounts of missing data can pose difficulties with data wrangling, cleaning and analysis in later stages. Prioritize questions that directly contribute to defining distinct segments rather than collecting excessive, non-essential information, especially from only some of your respondents. By aligning questions with specific segmentation goals, businesses can ensure their data remains actionable

and their understanding of consumers stays sharp.

TIP #1: Use validated scales where applicable and consider segmenting by actual behavior rather than just intent, as consumers' purchase decisions may differ from their survey responses. Additionally, ensure data sample diversity and representativeness to avoid skewed insights that disproportionately reflect a subset of the market.

TACKLE THE NUANCES

Now that you have identified the questions you want to ask and the questions you want your segmentation to be built on, you must ensure that you are prepared to tackle the nuances of the data. Demographic data is some of the most sought-after and may help draw out consumer insights but it can also be difficult to work with. That's because demographic data comes in all forms (e.g., continuous, nominal, ordinal) that may need to be recoded or reverse-coded and can have large variances when compared to another. Each of these unique, inherent nuances may cause segmentation models to be incorrect, inaccurate or, worse, invalid. Although each requires a tailored approach, having a plan in place ahead of time will mitigate any severe data-related problems.

Once your data is collected and cleaned, you are ready to begin the technical aspects of the segmentation process. The first step is to construct a number of factors that will help differentiate and identify your consumer segments, which are integral to segmenting your consumers. This process involves trial and error, as well as flexibility about what data to include. There are multiple ways to construct and identify these factors, commonly

using a modeling approach called exploratory factor analysis. This approach can help identify what questions or data might be removed from or added to the model, the relative importance of each question or data point, what the underlying factor structure should be, whether factors are orthogonal and, ultimately, what latent concept each factor represents.

For example, if you added 20 questions into your exploratory factor analysis and the analysis identified four different factors, the next step should evaluate how questions are grouped together, such as if there are questions that do not go well with the others, and confirm that each factor explains a unique amount of variance, separate from the others.

Perhaps you noticed that one of your factors is comprised of three questions asking about how the consumer prefers to communicate with your organization and one question asking about the degree to which the consumer wants to be included in decisions. You could consider this factor one of consumer "involvement." This process continues until all your key factors are sorted and identified.

Cluster analysis is the recommended way to put your consumers in larger groups. Based on a set of algorithms, consumers will be grouped into segments that are similar in scores on your key factors. Although there are different cluster analyses, one question is always asked: What is the correct number of clusters? Unfortunately, there is no one answer for all segmentations. The correct number for you is based on the overlap, or lack thereof, between the clusters. Although cluster analysis is an objective assessment of the data, this also requires some subjective evaluation on the part of the researcher. If your cluster solution has too many segments, you may have too much overlap between segments.

Identifying the perfect amount of overlap, along with the ideal number of consumer segments, requires time, effort and experience. The best way to get started is by using a software approach to get you in the ballpark. From there, it's up to you, the data and lots of time. To compare different cluster numbers or cluster solutions



TIP #2

BE AWARE OF HIGHLY NICHE OR POLARIZED CONSUMER SEGMENTS!

(e.g., to compare a six-segment solution to a seven-segment solution), you can begin by assessing differences in scores on the key factors you constructed. If there are still several competing solutions, it may be worthwhile to bring other data points – such as other psychographic measures, behaviors or even demographic questions or other questions that may have almost made the cut – into the factor analysis.

As you are evaluating a potential solution, it may become apparent that there is too little or too much overlap occurring and that solution can be disregarded. This process repeats and continues until the best solution among the competing solutions is

identified and you have your consumer segments. Lastly, get the software to implement that solution and bucket your respondents into their respective segments.

TIP #2: Be aware of highly niche or polarized consumer segments! For example, if your organization provides a service, you are probably familiar with a group of consumers who can be either extremely pleased with your service or extremely displeased with it. These segments can be highly differentiated from your other segments, although not always in a good way.

LASTING IMPACTS

We highly recommend involving key stakeholders from across the organiza-

tion to ensure that every part of the process is a success. However, this is an especially important step at which to include other stakeholders, as the decisions made here will have meaningful and lasting impacts on the entire organization and often require data or insights from each department anyway.

With your key factors defined and segments determined, you're ready to generate actionable insights. Identify your segments' scores on key differentiating factors and then start assessing each segment's scores on every other data point that you collected. Looking at each data point broken down by segment may lead to unexpected or unanticipated insights. For example, you may have expected that the different segments of your customer base view financial aspects differently, but now, you can sort through the data for less obvious information. Does one segment insure their household electronics at much higher rates than others? Does one segment switch providers constantly? Does one segment tend to join your customer base from one specific

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company or organization? As you filter through your data, you may find trends that were not exposed while determining your key factors or your segments.

In constructing your segment profiles, keep in mind that information does not exist in a vacuum. Consider understanding unique segment differences alongside broader, contextual information. For example, if there is a segment that: a) spends more on your product's or service's category in general; b) has the highest income; c) and has fewer financial responsibilities in their lives, that segment is likely of higher priority to your organization than a segment that is unaware of your product or service, has the lowest income and has more financial responsibilities. Using a simpler, more straightforward approach, such as relative indexing, or a more sophisticated approach, such as regression-based modeling, you can rank-order your segments based on their scores on whatever data points your organization prioritizes most.

Always consider segment overlap and preference together! Perhaps one of your less-attractive segments also happens to highly overlap with your most-attractive segment in that they spend the most hours watching a particular television show. Although you may not be attempting to directly target the less-attractive segment, you could increase your marketing spend in this instance, due to the marketing phenomenon called the spillover effect. By targeting the most-attractive segment, you will also inherently convert consumers of the other segment – the spillover effect.

TIP #3: Visualize your information! These segment profiles contain the exact information foundational to why you conducted your segmentation – make sure to engage others and



TIP #3

VISUALIZE YOUR INFORMATION!

display information in a variety of ways.

EFFICIENT AND EFFECTIVE

Using the information surrounding your newly created segments, you can tailor messaging, creative strategies and media placement to ensure that the right message reaches the right consumer at the right time. Combined with such strategies as digital ad targeting, personalized e-mail campaigns or strategic media buys, segmentation provides the foundation for more efficient and effective marketing efforts. Your brand can focus resources on the consumers most likely to engage, convert, and remain loyal – maximizing ROI and strengthening market positioning.

Segmentation should not be seen as the end of the entire process but instead as the beginning of a whole new one. In addition to giving you invaluable information about the market and the consumers in your category, segmentation can also provide information on what new product or service lines could be introduced and how they may integrate with your organization's current portfolio. This opens the door for other marketing exercises, such as A/B testing or concept testing, to include ways in which you may best reach your consumers about this new product or service line. Through small-scale pilot testing, A/B testing can highlight which would be the preferred service offering. All

of this is an extension of your initial segmentation efforts.

LAY THE GROUNDWORK

Segmentation is valuable beyond informing marketing and advertising strategies in the present. One way to ensure its continued usefulness is to create a tool that can help determine segments in future research. A classification tool, also called a typing tool, is an instrument that can determine a consumer's segment based on a few key questions or elements. It allows future research to focus on gathering other insights while still being able to determine which segment consumers belong to. Rather than running the whole segmentation again, you can send a shorter questionnaire to more respondents to classify them and assess your strategic marketing and advertising goals.

There are multiple methods for constructing the typing tool or classification tool; your specific circumstances dictate which method would be easiest, most accurate and the most logical to use. No matter what you use, the goals should be: a) not re-segmenting respondents but using the new model to extend the old model to predict the classifications of the new data; b) optimizing the trade-off between number of questionnaire items and accuracy of classification; and c) creating a repeatable and verifiable model.

Thanks to the evolution and refinement of large language models (LLMs), you may even create typing tools in web-based interfaces. For example, it is possible to use LLMs to integrate a typing tool into a survey platform, such that consumers are segmented, based on previous data, before they even complete the questionnaire. However, it is imperative to have your researchers check every aspect of the process, as these technologies are still



TIP #4

DICHOTOMIZE YOUR CLASSIFICATIONS!

in their infancy and are known to make mistakes.

TIP #4: Do you need a lot of items to create a reasonable degree of accuracy? Dichotomize your classifications! You may consider reducing your classification scheme from the overall number of consumer segments to instead be a binary 0/1 variable, where a value of 0 would indicate not belonging to a target segment and a value of 1 would. Because multinomial logistic regression is an extension of the simpler binary logistic regression, your analysis remains the same, yet model accuracy drastically increases.

DEFINING THE MARKET

Another advantage of segmentation is that it permits you to size your market. Market-sizing is an estimate of the potential customer base for your product or service, which helps your organization understand its place in the competitive space, provides an honest assessment of where you are and identifies growth areas. This is a standalone process, although it is often integrated with a segmentation effort.

Markets can be sized by different metrics, such as number of customers or revenues. Each method offers distinct insights into the market and its impact on your organization. For example, if you were interested in selling a product to male consumers over 18 in the United States, you may start your market-sizing with the most recent U.S. Census estimates for that population (165 million in 2024). Taking it a step further, if you knew that one in every five men bought this product once in their lifetime, for an average price of \$30, the market size in terms of revenues would be \$990,000,000. Although this is a simplistic example, this is the basis for market-sizing.

Often, market-sizing is overlooked due to misconceptions or assumptions about the market. However, one way to convince stakeholders to pursue a segmentation project is to discuss the additional advantages, without any downsides, of a market-sizing analysis. For example, market-sizing gives your organization critical information as to how many consumers are in the total addressable market for

your product or service. Presenting this information can help frame the information provided from a segmentation. When you know how many customers are in your market, you can generalize those estimates to how many customers or revenues may exist in each segment. In future segmentation efforts, this can provide specifics about how well your marketing approaches worked. In most cases, the data already being collected for segmentation, along with third-party data, can get your organization to an estimate of your market size.

Two of the most common approaches of market sizing are the top-down approach and the bottom-up approach. With the top-down approach, you have the widest part of your market at the top, such as the population of a given region. As you work through your approach, you apply filters and become more specific, such as a certain age group within that region. Continue this process until you have reached the most specific target demographic of interest. The last step in a top-down approach is determining the portion

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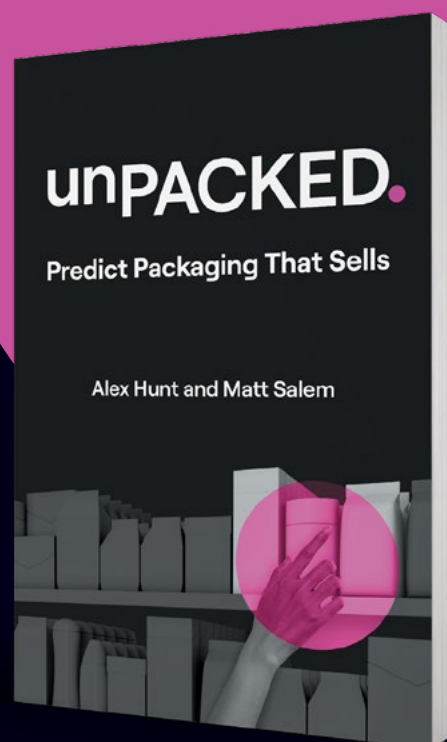
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TIP #5

ONCE YOU HAVE YOUR OWN MARKET SIZE FOR YOUR COMPANY, YOU CAN ALSO COMPUTE MARKET SIZES FOR YOUR COMPETITORS.

of the final number that your organization occupies.

As a hypothetical example, Company A is interested in a top-down approach for its hockey skates. Beginning at the broadest part, Company A is willing to do business in Canada and the U.S., which equates to 366,576,000 people. From there, we can add filters and increase specificity. Sources estimate that 11.6 million people are engaged in ice skating sports, with nearly 2.5 million playing ice hockey. If we extrapolate that percentage from the U.S. to Canada, while increasing it for Canada's generally longer, colder winters and higher levels of winter sports participation, we get 3.09 million people between the countries. Lastly, hockey requires more gear and has a higher likelihood of individuals owning their gear versus renting. Applying a conservative filter of 95%, with 5% renting, our final market size is 2.94 million people. If Company A sold 300,000 units, we can estimate that it would own 10.2% of the market.

The bottom-up approach is nearly the opposite: You start with your organization's revenues or customer base and generalize it "up" a step or two. Commonly, the last step in a bottom-up approach is calculating the number of people or the number of revenues in your target demographic. Although this approach relies heavily on survey and internal data, there are fewer assumptions to be made and the assumptions to be made have a higher degree of accuracy. Keep in mind that generalizing too far is inaccurate and unnecessary (e.g., there is no need to calculate your way to the widest part; the U.S. census already provides that).

Now, the bottom-up approach, although sharing some of the same

steps, will be much more targeted and precise than the top-down approach. Using a combination of data collected from our survey and third-party information, Company B has determined that it owns 14% of the market for consumer electronic insurance. With a customer base of 780,000, Company B can generalize up a step to determine that the relevant market size is approximately 5,571,000. Company B can do the same for revenues by extrapolating the ratio of its share of the market to the relevant market size overall.


Each approach has its own advantages. With the top-down approach, you can use very detailed information about your market and tailor it as you see fit. If there's an estimate for the filter you want to provide, you can simply keep adding filters until you have reached your desired target demographic. However, the more filters you add, the more you introduce what is called measurement error, or the amount of difference between the numbers you used and the exact number. The bottom-up approach may serve as the inverse. Although it relies more on your organization's specific data, it also more strongly controls the measurement error in your approach; if your organization sells a product, it's likely you know, within a

very small margin of error, how many customers you have.

TIP #5: Regardless of approach, once you have your own market size for your company, you can also compute market sizes for your competitors if data surrounding their sales or consumer base is known, a process known as competitive market-sizing.

A STRATEGIC IMPERATIVE

Consumer segmentation is far more than a data or questionnaire exercise. It is a strategic imperative that empowers your company or organization to understand its audience deeply, engage them meaningfully, and grow intelligently. The process demands rigor, cross-functional collaboration and continuous refinement but the payoff is clear: smarter decisions, stronger connections and sustainable success. As markets evolve and new tools emerge, so too must your segmentation efforts – ensuring that your organization remains not only relevant but also resonant with the people who matter most.

TIP #6: Even outside of macro-level events that may disrupt markets and purchasing behaviors, such as a global pandemic or economic recession, segmentations wear out or become outdated due to constantly changing marketplace conditions. Make sure to refresh your segmentation every so often to keep up! 

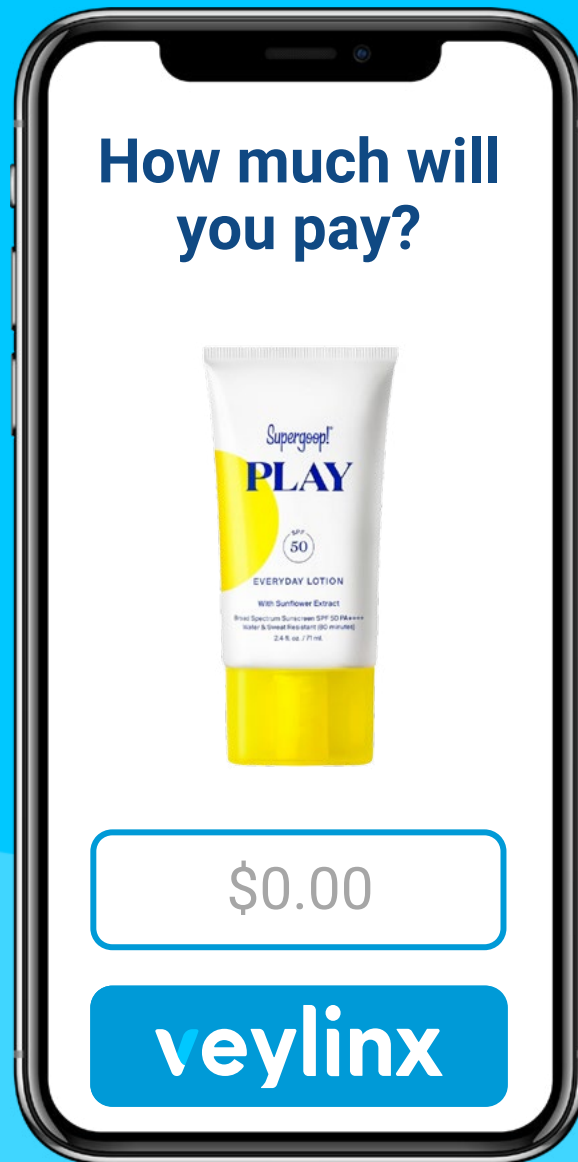
Kyle Rawn and Lindsay Roberts are senior research managers at MMR Strategy Group. They can be reached at krawn@mmrstrategy.com and at lroberts@mmrstrategy.com.



TIP #6

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When does good data go bad?

The shelf life of an AI synthetic panel

| By Rasto Ivanic



abstract

Temporal decay of accuracy is a major driver of expected economic returns from investing in a synthetic respondent panel.

Are surveys that require humans to answer researchers' questions still necessary? Do the expense and time commitments needed to execute traditional market research justify the value that survey research provides? Or is gen AI technology at the point where traditional survey research can be replaced by cheaper and quicker querying of synthetic panels? This article explores the economics of the two alternatives. It offers a framework and a few rules of thumb for researchers who may be considering which option is more appropriate for their specific use case.

We propose that the economics of a reliable synthetic (aka gen AI) panel depend on a few key factors: the accuracy of the initial panel training; the decay of the panel's accuracy as the world around it changes over time; and the number of ad hoc surveys the synthetic panel replaces.

Connect with consumer preferences

The success or failure of industry innovators, marketers or product designers ultimately depends on their ability to connect with consumer preferences. Unsurprisingly, they rely on many tools and techniques to uncover and understand consumer decision-making preferences before committing millions of dollars to market a product.

Synthetic panels and AI-generated virtual avatars are a new approach to understanding consumer preferences. Trained on human data to answer customer insight questions, they offer flexible and near-instantaneous access to virtual consumers with the promise of helping researchers receive answers to their questions faster and potentially more cost-effectively than traditional ad hoc panels, focus groups or live interviews. The ability of synthetic panels to mimic human



consumer responses is rapidly developing and it is expected that their prediction accuracy will continue to approach that of human panels.

However, innovative marketers and product designers do not develop new products in static environments. Consumer preferences change over time, sometimes frequently and often unpredictably. The benefit of conducting market research with human respondents is that temporal changes in consumer preferences are embedded in every new batch of collected data. Alternatively, data collected from a synthetic panel trained on human data at a prior point will eventually become obsolete unless the synthetic panel is continually trained and re-trained over time.

The purpose of this article is not to argue for or against the merit of synthetic panel data as a research method. Instead, it offers a framework for marketers and researchers to think through their decisions to invest in synthetic panels versus conducting ad hoc human surveys.

Why synthetic respondents matter

Synthetic panels offer a substantial opportunity to simulate data that would normally need to be collected – often at great cost – from surveys and in-person interviews. Intelligent synthetic panels thus offer an opportunity for researchers to ask follow-up questions and test hypotheses that evolve dynamically. This technology is particularly useful when human respondents are difficult or expensive to reach on topics closely related to the data sets used to train the synthetic panels.

The costs of constructing well-trained synthetic panels are not trivial. Even when data processing is fully automated, recruiting and compensating human subject-matter experts needed to train a synthetic panel can cost anywhere from \$20-\$50 per recruit for a general-population panel and \$200 or more per recruit for B2B respondents or

other highly specialized panels. This makes building a synthetic panel that can answer questions beyond a trivial ChatGPT inquiry a sizeable investment of thousands, if not tens of thousands, of dollars.

Therefore, market researchers should carefully consider the return on their investment, understanding that there are alternative approaches to collecting data, such as surveys, interviews or other primary research methods. These alternatives, however, have the disadvantage of delivering insights one time only and do not lead to creating a productive asset (synthetic panel) that can continue to answer questions and provide insights more than once.

To make an informed decision, we introduce a framework that could help decision-makers determine which of the two approaches may be a better investment of their customer insights dollars: building a robust synthetic panel (an asset) or commissioning human-only market research (an expense) when and as needed. Framing the two alternatives as a one-time investment into an asset versus a series of expenses over time allows us to apply a simple decision-making framework to determine which strategy offers a greater economic benefit to the business.

Understand underlying drivers

Before discussing economic returns, we should understand the underlying drivers of value for market research and, by extension, the value of a synthetic panel or an ad hoc survey. In market research, we ask customers questions to understand their preferences and make accurate predictions about their future behavior. We often plan to invest significant resources into making a product a market success and asking smart questions of consumers is a way to hedge our bets and de-risk our decisions.

Prediction accuracy, or being able to rely on model data and the stories it tells, is the main objective of any market research we do – whether with human or synthetic respondents. If we believe that a synthetic panel is an investment, it should continue to have value and deliver precise predictions over time and, ideally, the investment into it should be

no greater than the aggregate value it produces over its multiple uses until it becomes obsolete. In that respect, synthetic panels can be thought of as any physical or financial asset. A bridge built a hundred years ago may have lost its value and function and need to be replaced even if it was meticulously maintained. Financial investment needs to produce risk-adjusted interest over time greater than the inflation rate during that period or it will become less valuable as time passes. Synthetic panels, we argue, behave much like other assets with their present value decreasing over time. At a minimum, the cost of building and maintaining a synthetic panel should be lower than the total cost of all ad hoc surveys that would have been conducted in the absence of the synthetic panel asset.

Therefore, we propose that the decay of accuracy of any synthetic panel should be considered when investing in it, much like we consider material decay over time before building a bridge or an inflation expectation before acquiring a financial asset.

Before discussing training accuracy decay, let's first talk about the other key driver of the synthetic panel's return on investment: its initial training accuracy. Just like a bridge is at its best right after it is built, its "best" may or may not be good enough to pass the initial inspection and allow cars to drive on it. Park et al.¹ show that a well-constructed general synthetic panel can be quite accurate relative to the answers obtained from its human "trainers." The accuracy of a synthetic panel, however, is not guaranteed to be high for all panels equally. Using a synthetic panel to answer questions about pulmonary disease diagnoses will not perform well relative to answers given by pulmonologists if the synthetic panel was constructed from a general population that knows nothing about how lungs function.

Initial training accuracy – or the match of the synthetic panel's responses to questions asked by researchers compared to answers to the same questions given by its human counterpart at the time of model training – is as important and possibly an even more powerful driver

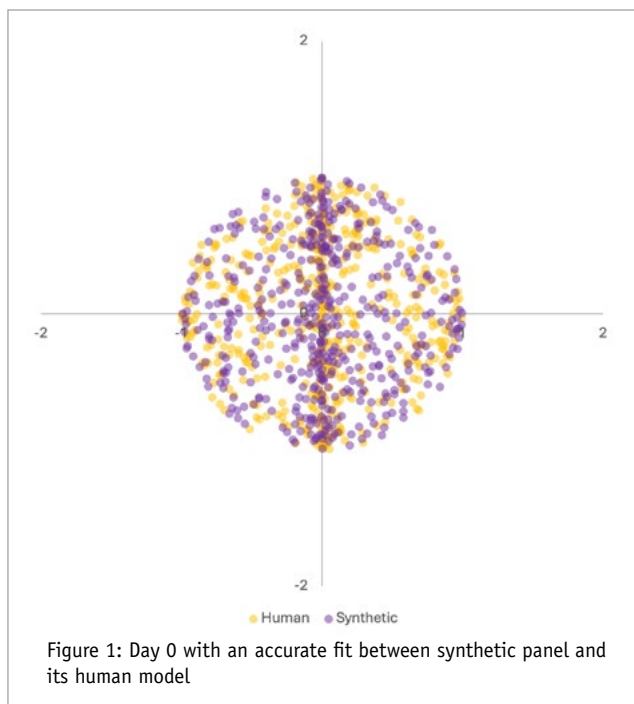
of the panel's future prediction accuracy than its natural decay over time. Which of the two drivers affects the economics of the synthetic panel asset over time likely depends on many factors such as the specific research topic, the quality of the modeling, the quality of human training data, etc.

Different research topics will likely behave very differently over time: the current state of pulmonary diagnosis is probably more stable over time than, for example, the population's preferences in pop music. Therefore, getting the initial accuracy of the pulmonary synthetic panel right is probably the more important factor driving its ROI. Alternatively, taste in music is much more fluid and unpredictable, so even the most accurate initial synthetic panel may not help make good predictions just a few months later. Whatever the relative importance of temporal decay and training accuracy may be, we propose that both of those forces are at play and that they are orthogonal to each other as independent variables. They shape the investment thesis for any synthetic panel independently and simultaneously.

Accuracy and decay framework

To make our framework applicable, we need to establish a generally acceptable benchmark to which we can relate the performance of synthetic panels over time. Fortunately, in consumer research, we have a readily available benchmark in human data. There are established best practices on how to measure accuracy, error, biases, etc., for example, as used by Park et al. While discussion of measurement approaches and best practices is an important area of research, it is not our focus here.

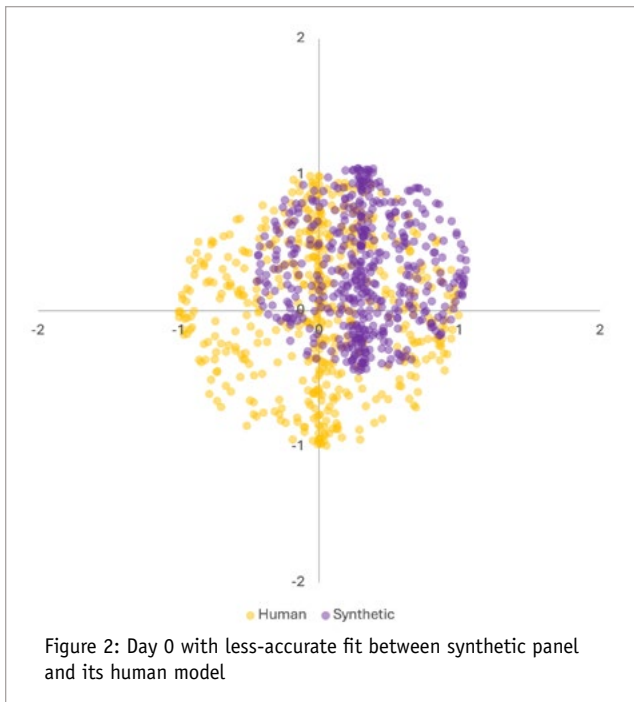
Keeping the concept of temporal decay and training accuracy simple, we first illustrate it visually with



simulated data and then propose its possible generalized functional form. In our illustrations, each data point represents an answer provided by either a synthetic respondent (collectively a synthetic panel) or by a human (collectively a human panel). A data point may represent any possible survey answer, from a simple Likert-scale answer or a natural text response reduced to a two-dimensional vector. Note that in all illustrations, the human benchmark data is presented in orange and synthetic data is in purple.

As a starting point (Day 0), imagine that we could construct a synthetic panel model that would answer all research questions as accurately as a human panel. Further, from the aggregate data perspective, the outputs of the two models would look indistinguishable in their means and variances. Figure 1 shows what such an accurate match could look like at the time immediately after the synthetic panel is constructed to match a human panel at that point in time.

It is, of course, hardly realistic to expect that we could construct a synthetic panel with a 100% match between it and its human starting point. Therefore, a more realistic starting point would look like something we illustrate in Figure 2. Here, we see a small systematic bias (moving the synthetic answers toward the top-right quadrant) and different



centered at the mean with less variance. It is possible that future models will do a better job of simulating variance closer to what a human panel would provide without excessive hallucination. However, today it is more likely that a synthetic panel will yield more uniform data than that coming from human answers. As an illustration of how data variance may differ between synthetic respondents and humans, see results of

Over time, as the world around consumers changes and humans process and adjust to new information, they also change how they would answer the exact same questions that were asked before. Park et al. have shown that with about two weeks between the same two exercises, human answers show inconsistencies. They exhibit an “error.” A part of this error may be truly random – due to humans being inattentive or making mistakes – but part of it may be due to humans updating their decision criteria. Therefore, what may appear as a random human error to an observer who studies data to two identical surveys over time may reflect the fact that the world around us has changed and therefore answers to the same questions must also be different to be accurate. Without retraining, a static synthetic panel will eventually lose its match to reality.

Figures 3 and 4 illustrate such drift. As humans update their preferences, their answers (again: human data is in orange) move toward the lower quadrant while the data from a synthetic panel (in purple) remains

variance resulting from error which any model will be subject to, including gen AI. Note that the variance in synthetic data is smaller than human data variance. In practice, the variance may be greater or smaller but in our experience, synthetic respondents tend to provide answers more

our earlier experiment² in which we compared synthetic panel responses to human survey data.

Figure 2 still shows that the fit between the two models is good – synthetic responses are contained within the bounds of human answers – but the synthetic panel is less accurate.

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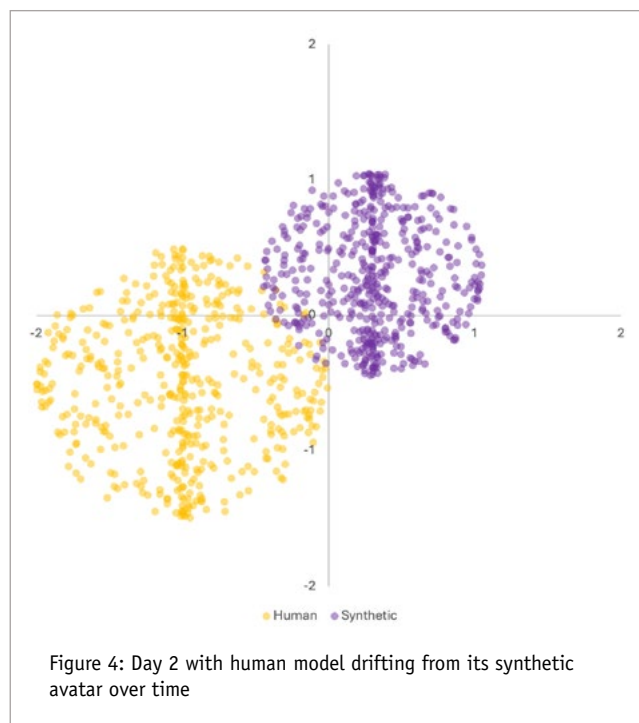
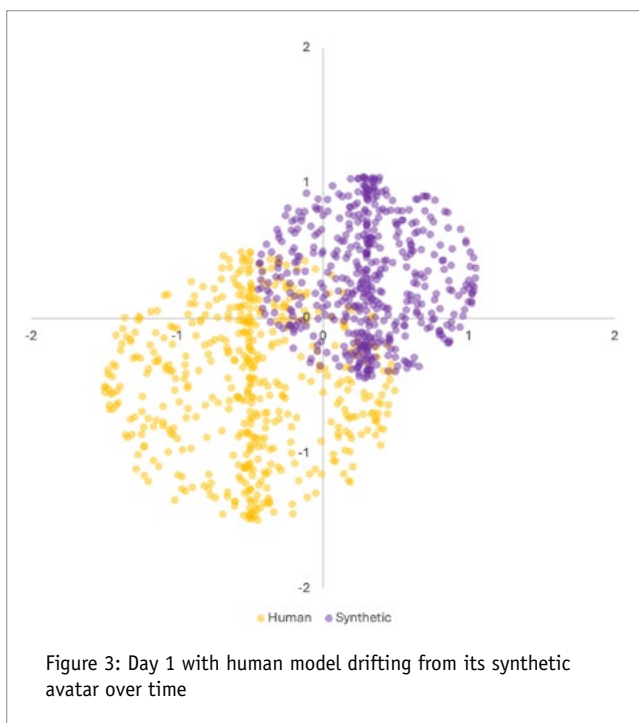
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End-to-End Capabilities

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static, frozen in time in which it was constructed.

Ultimately, after more time elapses, the human and synthetic models no longer overlap, and one can conclude that answers provided by the two models over time may

diverge enough to produce incongruent results: the synthetic panel has decayed beyond its useful shelf life.

To move from conceptual to practical (i.e., measurable) understanding and of data accuracy decay, we must describe this effect as a mathematic

expression that can be estimated empirically. The fit accuracy between the synthetic panel and human data to a specific question over time could be expressed as a function of training accuracy and decay as follows:

$$\alpha_n(q_{n,s}, q_{n,h}) = f[\delta_n(\epsilon_n^h, k), \lambda_n(t)] + \epsilon_n$$



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Where $\alpha_n(q_{n,s}, q_{n,h})$ is a measure of answer accuracy match between the answers to a question n provided by the synthetic panel $q_{n,s}$ and the human representative sample $q_{n,h}$. It is a function of training accuracy δ_n for a specific question and its accuracy decays in time $\lambda_n(t)$ and ϵ_n is a random error. Training accuracy is itself a function of training answers provided by humans ϵ_n^h and function k , which is a parameter representing the model used to train the synthetic respondent panel using human answers as input. Accuracy decay $\lambda_n(t)$ is a function of time elapsed since the time the synthetic panel was trained by the model k . It is specific to a question n because it is reasonable to expect that answers regarding some topics evolve quicker (e.g., taste in music) than answers to other topics (e.g., pulmonary diagnoses, ethical questions).

It is not the purpose of our article to hypothesize about the functional form of the accuracy function, but we can hypothesize that $\lambda_n(t)$ is decreasing in time and therefore overall accuracy $\alpha_n(q_{n,s}, q_{n,h})$ will also decrease

in time. Regardless of how accurate the initial training is, the overall accuracy of a synthetic panel may decrease rapidly for those topics that are subject to rapid and significant mind-set updates within the human panel.

With this framework established, the next logical – and very practical – question a researcher would ask is “How quickly does the accuracy of a synthetic panel decay? Is it days? Months? Years?” Further research is needed to find out. Namely, empirical research could develop a more accurate functional form of temporal decay function and estimate topic-specific parameters and provide useful rules of thumb.

The economics of synthetic panels

Without a reasonably accurate estimate of temporal decay function, it is difficult to calculate the useful shelf life of any specific synthetic panel. There are, however, some reasonable data points and assumptions researchers may already have at their disposal to start understanding the

economics of synthetic panels at least in the order of magnitude.

As an illustrative example, let's assume that we are trying to understand the economics of a general-population synthetic panel focused on dental hygiene and, specifically, consumer preferences for power toothbrushes. (We are using this example because we have access to real data from a project we have recently completed.)

Following roughly the methodology that Park et al. used to construct a strong synthetic panel, its main cost stems from interviewing a large sample of humans who fit the desired use case. Such interviews help train the synthetic model in the subject matter in our example, on the topic of toothbrushes, flossing, oral hygiene, mobile apps, power toothbrushes, etc., and give avatars their “personalities.”

Construction of a panel with an incidence rate of about 15% and with $N=1,000$ for about an hour-long AI-assisted in-depth interview would likely cost around \$25,000 to \$35,000 in recruiting fees and honoraria only.



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(Based on typical costs of human panel recruitment.) Adding any license access fees to synthetic panel platforms (\$5,000) and accounting for the cost of a data scientist to oversee the project and ensure data quality (25 hours at \$200 per hour) would likely get us to about \$35,000 to \$45,000 in initial cost of the panel (not accounting for any future maintenance or retraining).

As an alternative, if we didn't construct a synthetic panel for our research, we would likely choose to obtain answers to our questions in one or more online surveys. Depending on the nature of such surveys, we may not need as large a sample as was required in our training exercise. Going back to our practical example, we recently conducted a robust study with a sample of 500 qualified respondents (incidence rate of 15% and length of interview of 18 minutes) at a cost of about \$5,000.

Frequency of surveys

A critical factor that will likely determine the return on investment in a synthetic panel is the frequency

of its usage. In our example, to make the \$50,000 investment in a "dental hygiene and power toothbrush users" synthetic panel economically attractive, it would have to replace about 10 surveys of 500 respondents at \$5,000 cost per survey, holding everything else equal.

Practically speaking, however, the frequency of usage equivalence is probably lower than our estimate of 10 in our example. Here are some of the reasons why.

First, speed and availability: Having access to a synthetic panel allows decision makers to ask questions without having to commission formal survey projects. Availability of synthetic panel could lead to more ad hoc inquiries supporting more agile decision-making. The value of making faster, more-informed decisions is difficult to quantify but those factors are surely important positives in favor of synthetic panel economics.

Second, the cost of research project overhead: The price of a sample is only one part of the cost of market research. If synthetic panels allowed decision makers to avoid all or

some of the cost related to designing and interpreting survey research, it would take significantly fewer projects before synthetic panels start looking economically attractive. If a traditional consumer survey cost an additional \$10,000 in professional fees to a market research firm on top of \$5,000 in respondent costs for the total cost of \$15,000 for an ad hoc survey, the synthetic panel frequency of use equivalency would plummet to three-to-four surveys to recoup the initial \$50,000 synthetic panel investment.

Clearly, the more human-answered surveys can be replaced by a synthetic panel, the better are the economics of its initial investment. However, we argue that companies do not have an unlimited amount of time to recoup this investment. Unless the synthetic panel is periodically retrained and updated, the answers it provides will eventually become inaccurate. This brings us back to the original topic of our inquiry – the useful shelf life of a synthetic panel. For the economics of a synthetic panel to work, researchers must not only get a certain number



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of uses from it to overcome its initial cost, but they must get that usage before the information value of the panel expires or drops to the level at which it is no longer believable enough to support business decisions.

Let's return to our dental hygiene and power toothbrush example. If a power toothbrush brand typically launches a new product every two years and if that is the only time it commissions customer surveys, it would take three-to-four new product launches over a period of six to eight years to recoup its initial investment of \$50,000. This would likely be a borderline acceptable capital investment for the company and it would be likely even less attractive if we account for possible major shifts in the market – such as technology innovations, new competitors or scientific and medical news – that could render the initial synthetic panel obsolete in a few years. On the other hand, if the brand conducts quarterly customer surveys, continually researches its markets and conducts several surveys or focus groups each quarter, it will likely make good sense not only

to invest in a synthetic panel but to update it periodically to ensure it is always fresh and it incorporates any new shifts in its market.

Assess the point of decay

Practically speaking, it is difficult for a market researcher to recognize when the point of excessive decay of a synthetic panel has occurred, because a synthetic panel, even if it is stuck in time or was not accurate to start with, will always give a reasonable-sounding answer when prompted. An essential part of a synthetic panel's value proposition for its user is trust in its accuracy, not only at the time of its commissioning, but as it ages.

An investment in a specific synthetic panel may or may not offer a long runway to researchers before its accuracy decays. That uncertainty is likely to undermine the trust researchers place in their synthetic panel. It is therefore critical for brands and market researchers to understand the decay curve for their panels and know at which point in time it should stop informing critical business decisions.

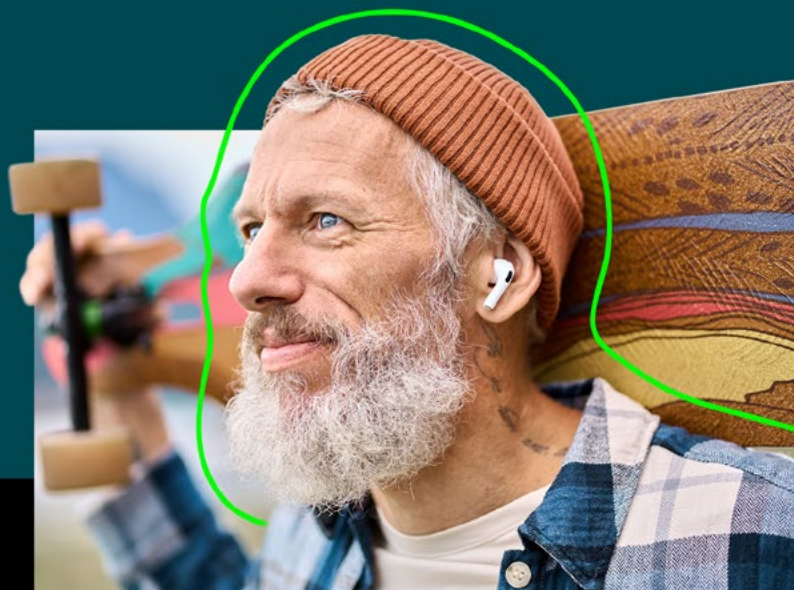
To address this uncertainty, industry and academia alike should invest in understanding the decay of synthetic panels and, more specifically, they should invest in empirical research to establish practical accuracy decay benchmarks for the use of market research practitioners. ¹

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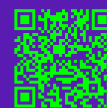
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A clear view to success

How to break silos with shared data

| By Mike Deinlein, Eric Scheer and Neil Leyshock



abstract

Marketing and customer experience teams can overcome collaboration barriers by establishing unified data systems with shared metrics and common definitions. This approach creates a single source of truth that aligns brand promises with actual customer experiences, improving retention and strategic performance.

In today's rapidly changing economic landscape, brands face numerous challenges that can impede growth. A 2024 survey of marketing executives by the CMO Council revealed economic uncertainty was considered a top growth inhibitor for 2025. In such situations, initiatives that fuel growth, like expansion, innovation or reorganization, often take a back seat to maintaining revenue. However, it's been shown that brands that maintain these growth measures despite economic unrest come out stronger in the end.¹

To remain on a growth path, internal teams must first be aligned to a unified vision. Yet, with entrenched obstacles like departmental silos, differing team cultures and disconnected data, cross-functional collaboration and alignment can seem impossible – and too complicated to remedy.

The collaboration paradox

Cross-functional collaboration supports specific skills that make brands resilient yet nimble. Studies show that multidisciplinary teams are more effective at solving complex problems and that teams made up of members from diverse backgrounds (gender, age, ethnicity, socioeconomic, experience, professional specialties) are more creative and perform better, compared to more homogeneous teams.²

Collaboration not only promotes innovation and creativity, it also elevates employee engagement and productivity. When teams share information, goals and credit, they create a workplace culture that fosters trust and inclusion. This translates to higher emotional well-being and productivity. Research from the University of Warwick supports the notion that happy employees are 12% more productive than their less-satisfied peers.³

The paradox emerges when, despite agreement that collaboration and cross-functional alignment are top enablers for growth, very few CMOs report that effective collaboration is happening. Salesforce recently reported that 86% of executives attribute business failures to ineffective collaboration. Further-



more, a separate survey by the CMO Council and KMPG revealed that only 22% of CMOs and CFOs are “very willing” to collaborate. Furthermore, the same survey highlighted that data-driven decision-making is the most important area for marketing-finance alignment. Read another way, the reluctance to collaborate is simply a lack of faith in a shared data strategy.⁴

The paradox exists because key obstacles commonly emerge that stop people from creating a shared data ecosystem:

- Silo mentality – departments prioritize their own KPIs and guard data as proprietary.
- Lack of clear roles – teams struggle with ambiguity about who owns what information and which group should take action.
- Cultural differences – teams may operate under different norms or assumptions.
- Insufficient tools – without a tech stack that facilitates access and analysis of information, groups may have access to pieces of information that support their objectives but fail to reveal the whole truth.

These obstacles are deeply engrained in organizations – which is why top-down directives, like task forces or corporate communications, aren’t effective in facilitating change.

Data: The key to a unified vision

Establishing a unified vision is one critical component of a collaborative culture, helping to guide teams and individuals to act independently but also in sync. Data plays a key role in supporting a unified vision, providing a common foundation and language that encourages teamwork and collaboration as well as promoting accountability through common metrics. The most effective col-

laborative organizations exhibit four overarching components regarding their data.

Established data enablers. Data enablers are individuals or teams within an organization who are responsible for facilitating the access, quality, usability and governance of data across departments. They act as the bridge between data producers (like engineers) and data consumers (like analysts, marketers, product managers) to ensure that data is accessible, reliable and actionable. Companies like Apple, Tableau and Ford Motor Company all employ dedicated data product managers to ensure that each dataset is useful, documented and consistent but tailored to unique departmental business needs.

Common data language. A common data language is a standardized set of terms, definitions and data formats that are shared and consistently used across an entire organization. It provides a unified way of describing, storing and interpreting data, ensuring that everyone – from executives to engineers to marketers – is speaking the same “data dialect.” Uber created a company-wide metrics store called uMetric which ensures that all teams use the same definitions for KPIs such as “rides per active user” or “driver churn” to support consistent business intelligence across regions and functions.

Uniform data standards. Uniform data standards put in place a consistent, organization-wide framework for collecting, formatting, storing and accessing data across all departments and systems. These standards ensure that data is structured and interpreted the same way regardless of where it originates. By eliminating discrepancies in data formats, labels and definitions, uniform standards help organizations reduce redundancy and improve data quality.

For example, Spotify uses uniform templates to record customer events and standardized data-logging practices for product analytics. This allows various teams – from engineering to marketing – to track user behavior in the same way, enabling consistent insights across the company.

Team autonomy. While ensuring consistent logging, use and interpretation of data is key to effective data democratization, organizations must remain adaptive and innovative at the same time. A shared data infrastructure can enable departments to operate independently while remaining strategically aligned.

After adopting uniform data governance standards, Walmart consolidated vast streams of operational, customer and supply chain data into one platform – Data Café – to enable teams across merchandising, marketing and logistics to access real-time insights.

These four keys to democratizing data are critical in allowing an organization’s insight ecosystem to grow cohesively rather than disjointedly. In

turn, this allows for more collaboration between teams while also making it easier to connect research data to the operational, behavioral, logistical and marketing data points that exist within an organization.

Brand and CX insights: A collaborative microcosm

One opportunity to break the collaboration paradox exists in the way brand and CX strategies are devised, executed and measured. Specifically, insights teams in support of brand and CX are often misaligned or disconnected, frequently organized around customer experience insights, marketing insights, innovation insights and then further compartmentalized by product teams, organizational structures and lines of business. This causes data silos to proliferate, making collaboration all but impossible.

Research details like how a question is asked, the sample used and the screening criteria may differ even slightly between teams, resulting in wildly different interpretations of the same KPI. For instance, imagine a CX team striving to create a more frictionless experience, while the marketing team's advertising

tells customers the brand provides an immersive experience. They both have data to support their individual positions but the misalignment between the promise and delivery causes the customer to be disappointed when the actual experience is different than their expectation.

By creating democratized data systems to foster a unified vision – based on clear data – across marketing and CX, brands can ensure that the promises made through advertising are consistently delivered through customer interactions, leading to a more trustworthy and reliable brand image.

A simple way to start

While breaking down silos and changing the ways things are done can seem like daunting goals – especially during times of economic uncertainty – there are simple ways to begin the process.

For experience-focused brands, customer retention offers a compelling benefit for aligning marketing and customer experience. Studies suggest that acquiring a new customer is five-to-seven times more expensive than retaining a current one.⁵ Increasing customer retention by 5% can increase profits by 25% to

95%. If the goal of marketing is to spur growth in an uncertain economy, elevating the customer experience to meet the expectations set by marketing in order to maintain customers is vital to a brand's near- and long-term success. But this is only possible if marketing and CX teams have the vision and tools that support their cross-functional collaboration.

To develop integrated marketing and CX strategies, teams need to answer questions such as:

- How strong is our brand and customer experience relative to the competition?
- How can CX improvements build stronger customer connections to our brand?
- How can our customer experience better deliver on our marketing promise?
- What is the optimal allocation of resources across marketing and customer experience initiatives?

Answers to these questions are critically important and Burke's experts advise beginning with understanding your organization's brand strength relative to the competition and then model how improvements in CX can close the gap or increase differentiation from your

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Figure 1

competition. By merging these data pursuits with a unified vision of strengthening the brand, teams can spend less time debating data interpretations and instead focus on taking action.

This modeling approach between marketing and CX can then show how the activities of one affects the other and vice versa. With heightened knowledge of the ways marketing and CX reinforce each, both teams can be empowered with the information to act independently. Now they can begin to predict the total

effects of their actions on touchpoints that are owned by the complementary function. This also reduces response time to competitors and macro-environmental factors.

Delivering on the brand promise: A case study

Recently, one of our clients – a leader in the auto insurance industry – wanted to empower its marketing and CX teams with tools to enable more strategic and adaptive messaging and CX delivery. Our

work sought to achieve this by obtaining a better understanding of the connection between their brand marketing and customer experience. They had two foundational studies – a brand tracker and a competitive customer experience tracker. While the insights from the two studies reinforced each other, we wanted to formalize this link and ensure that what the brand team promised to the market was embedded in the experience the customer had with the brand.

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The resulting model pinpoints customers' CX expectations of your brand promise and the degree to which your delivery is effective and differentiated

Marketing Promise

BRAND
LOGO

Summarized articulation of the brand promise with supporting reasons to believe

CX Components

CX attribute selected most often as important for delivering on brand promise

CUSTOMER IMPORTANCE 59%

CX attribute selected second most often as important for delivering on brand promise

CUSTOMER IMPORTANCE 51%

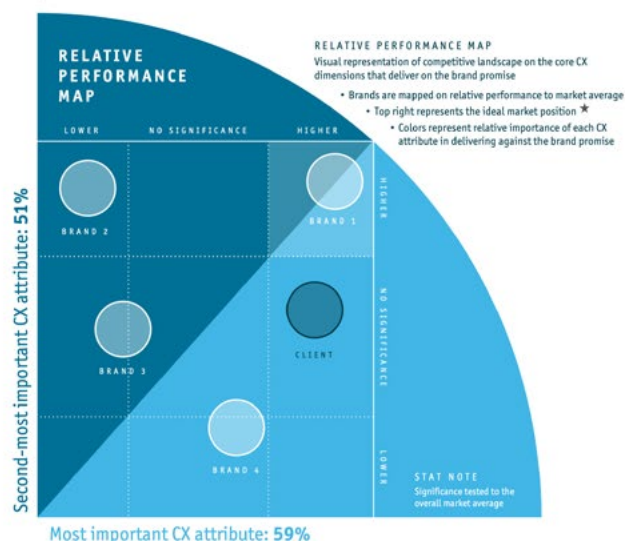


Figure 2

Our solution was to leverage the wealth of insight in the two foundational studies but also include a module that would allow us to model the effect marketing and CX have on each other. The result would help the brand unify its vision and promote collaboration by providing a single source of free-flowing data with a uniform understanding.

As such, we added just one module to our competitive experience tracker. We started with the brand promise and then carefully constructed experiential attributes that covered the touchpoint landscape and spoke to the brand promise. We then surfaced the promise to respondents and asked which of the attributes were most important to deliver and, finally,

how each competitor performed on each of the experiential attributes. This allowed us to create a marketing and CX relative performance map, as shown in Figure 2.

For our client, this allowed us to home in on the CX attribute they most needed to improve to effectively deliver on their brand promise. In this example,

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they delivered exceptionally on the most important attribute but had some work to do to close the gap to the market leader on the second-most important.

However, this also opened another avenue for a more unified marketing and CX vision. Our research revealed this brand had a particular CX strength in its self-service tools; furthermore, this CX strength was distinct from the competition. However, the brand's marketing did not promote this strength. We recommended evolving the marketing promise to incorporate the best-in-class self-service tools so our recommendation would allow the marketing and CX visions to work together, reinforcing one another.

In both scenarios, marketing and operations teams had a single source of truth and a unified action plan to support their brand message and experience delivery. Operations walked away with specific focus areas to improve the customer experience, while marketing knew what messaging tweaks could help support the experiential differentiators, unique to the brand. There was a unified language, a unified vision and a unified action plan.

A key enabler

As with the insurance industry example, free-flowing data with a unified vocabulary can be a key enabler of cross-functional collaboration, resulting in an organization that is more strategic, adaptive and innovative. But democratizing data demands standards that ensure accurate interpretation: access facilitated by data enablers and a unified vision supported by a common data language. These components are essential for establishing a system that encourages uniform understanding, which is the foundation for collaboration.

Within your own organization, consider starting with departments that have clear communication gaps such as aligning marketing and customer experience. Build or incorporate systems that use data to model relationships between the groups, giving them a single source of truth for monitoring performance relative to a single vision. By adopting these strategies, organizations can create a culture where data empowers action, aligns teams under a unified vision and makes collaboration a competitive advantage – even in the face of disruption. 

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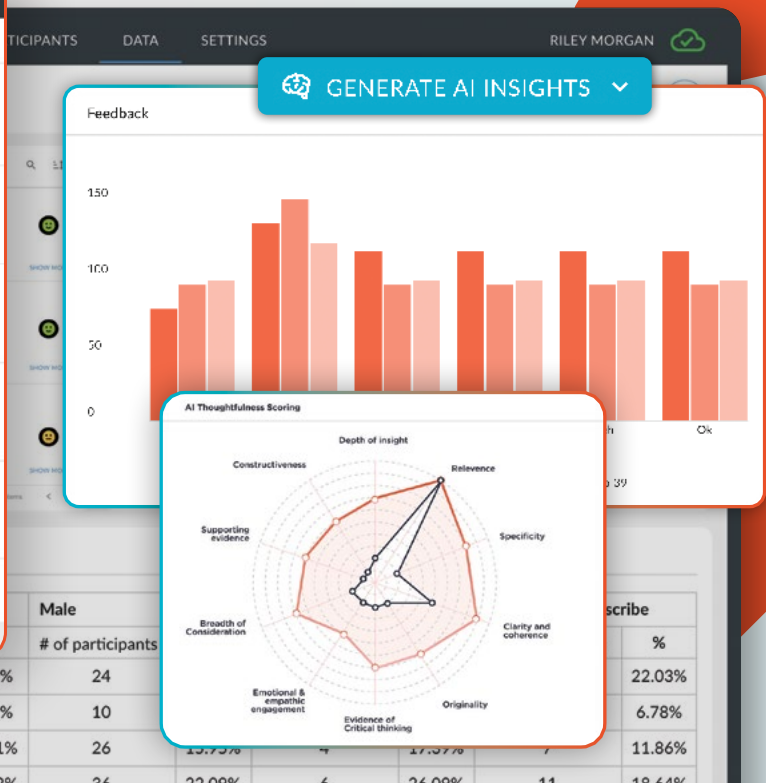
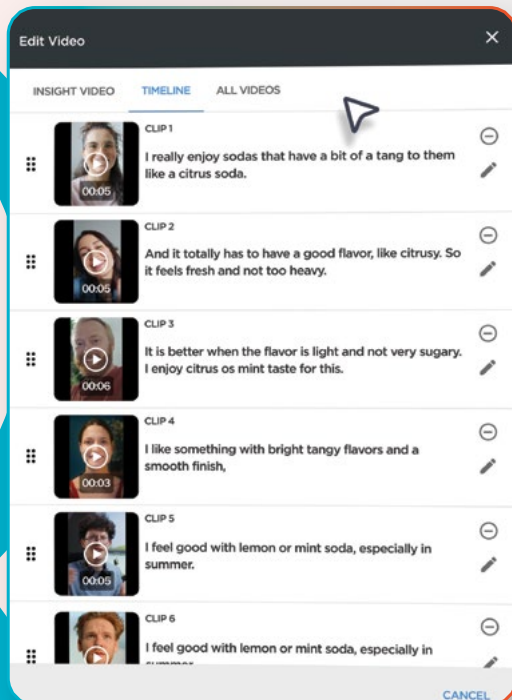
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The authenticity advantage

Study finds family businesses winning on trust

| By Jenny Dinnen



abstract

Comprehensive perception research uncovered family businesses' competitive advantages (authenticity, customer service, trust) while identifying critical messaging gaps around career growth and innovation. The study provides segmented generational insights and a strategic roadmap for closing the perception-reality divides that affect viewpoints on family businesses.

If you've ever watched "Succession" or "Yellowstone," you know family businesses make great TV dramas. But beyond the screen, family businesses are far more than entertainment; they form the backbone of the U.S. economy, accounting for 59% of private-sector jobs and over half of GDP.

Despite their economic impact, public understanding of family businesses is often vague, outdated or downright wrong. A new national study conducted by MacKenzie and Next Gen Collaborative set out to explore how Americans perceive family businesses today and why these perceptions matter more than ever.

As a second-generation family business owner and insights professional, this topic is deeply personal to me. My sister and I just celebrated 40 years in business at MacKenzie, having watched our dad and team build something incredible. I've also been involved with local and national business groups for over 15 years, conducting research focused on understanding their unique needs and challenges. From firsthand experience, I can tell you that most family businesses look nothing like what we see on TV.

I've long championed family businesses and often say my goal is to "change the perception of family businesses in the U.S." Recently, my sister (and co-owner) challenged me with a simple but powerful question: "What is the current perception of family businesses?"

That question became the spark for this project.

As we remind our clients: If you really want to know what people think, you must ask them. We can't rely on assumptions, especially when we're so close to the topic. And we can't simply look inward while ignoring the people we serve.

In partnership between MacKenzie and Next Gen Collaborative, we conducted a nationwide panel survey with 1,300+ U.S. adults to



Closing this gap isn't about seeking applause. It's about telling our stories in ways that resonate. Consumers and employees increasingly make decisions based on shared values and family businesses have a huge opportunity to shine by highlighting their social impact.

This matters. Edelman's data shows that 63% of consumers buy or advocate for brands based on shared beliefs. Deloitte's Gen Z & Millennial Survey reveals that younger generations are far more likely to work for and stay loyal to companies that demonstrate social responsibility. Without visibility into these contributions, family businesses risk being overlooked by the very people who care most.

Generational differences provide direction

Beyond overall trends, we segmented survey respondents into three life-stage-based groups to get a deeper view (Figure 1):

The Builders (18-39): Digital natives seeking authenticity and purpose.

The Navigators (40-59): Career professionals who prioritize reliability and trust.

The Mentors (60+): Legacy-focused consumers drawn to reputation and tradition.

understand what they think, feel and believe about family businesses. Alongside perceived strengths, our findings uncovered significant gaps between public perception and reality. We believe these gaps directly impact brand reputation, workforce attraction and competitiveness for family businesses.

For both family-owned and non-family businesses, the insights from this study highlight an important truth: Public perception, whether accurate or not, shapes your reality.

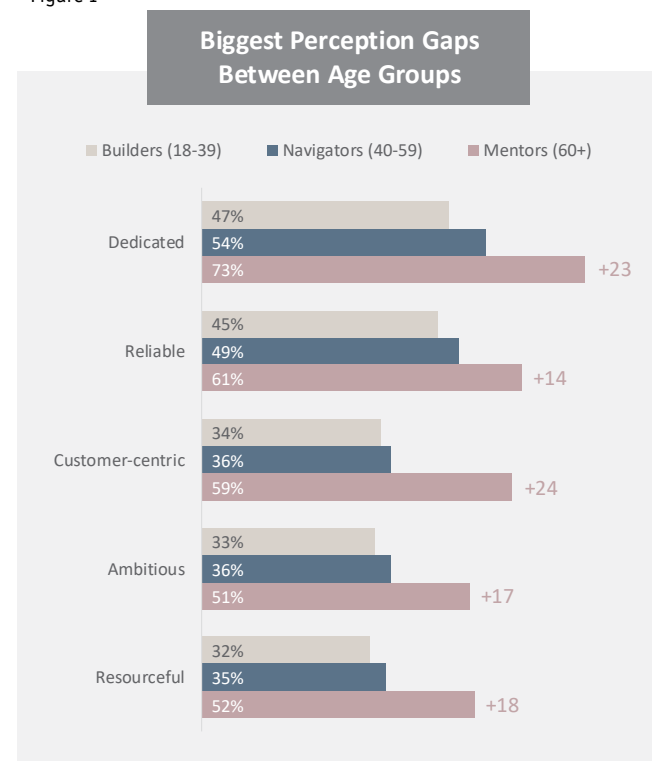
My goal in sharing these findings is to motivate business leaders to actively shape their narrative. By understanding how we're perceived, we can communicate our value more effectively and connect with the audiences who matter most.

Value-driven traits

Our study showed that respondents associate family businesses with value-driven traits like honesty (57%), dedication (55%) and passion (50%). This aligns with Edelman's 2023 Trust Barometer, which reports trust in family businesses at 66%. In a time when trust is a prized commodity, this is a major win and something family businesses should be leaning into.

But the picture isn't all rosy. Far fewer respondents associated family businesses with social responsibility (29%) or charitable giving (27%). That surprised me. In my experience, family businesses are deeply rooted in their communities, sponsoring local events, supporting nonprofits and giving back in countless ways. Yet these efforts often go unnoticed by the broader public.

Figure 1



Unsurprisingly, Mentors rated family businesses highest across nearly every positive trait, reflecting their deeper experience with family-run companies. For instance, 73% of Mentors said “dedication” described family businesses well, compared to 54% of Navigators and 47% of Builders.

The takeaway? While older consumers may already be advocates, there’s huge opportunity to engage younger audiences by focusing on themes that matter most to them – like purpose, transparency and community impact.

We didn’t just want to understand family businesses in isolation, we wanted to see how they stack up against private and public companies. That’s where things get interesting.

Where family businesses shine (Figure 2):

- Genuine and authentic: 70% of respondents saw family businesses as the most genuine and authentic.
- Best customer service: 62% rated them the highest level for customer care.
- Most trustworthy and transparent: 62% gave family businesses top marks here as well.

These results validate what many of us in the family business community already know: Our close-knit structures allow for deep customer relationships, agility in service and a values-driven approach that often feels more personal than transactional.

This authenticity is a clear competitive advantage, especially as trust and personalized experiences become bigger drivers of consumer choice.

Economic impact and career growth

The data also showed that public companies were seen as stronger in career growth opportunities at 40%, compared to 33% for private businesses and just 27% for family businesses (Figure 3). Public companies also came out on top for being known for the strongest economic impact at 48% compared to both private and family businesses at 26% each.

This gap is significant. In an era where younger generations are seeking both personal growth and purpose at work, failing to showcase career development and advancement opportunities can hinder recruitment and retention. It also limits broader brand recognition and credibility in competitive markets.

These perceptions may stem from seeing family businesses as smaller or less sophisticated, but do they reflect reality? We asked respondents to estimate the percentage of U.S. jobs and GDP generated by family businesses. Most selected 25-50%. In reality, family businesses account for 59% of private-sector jobs and 54% of GDP is far more than many realize.

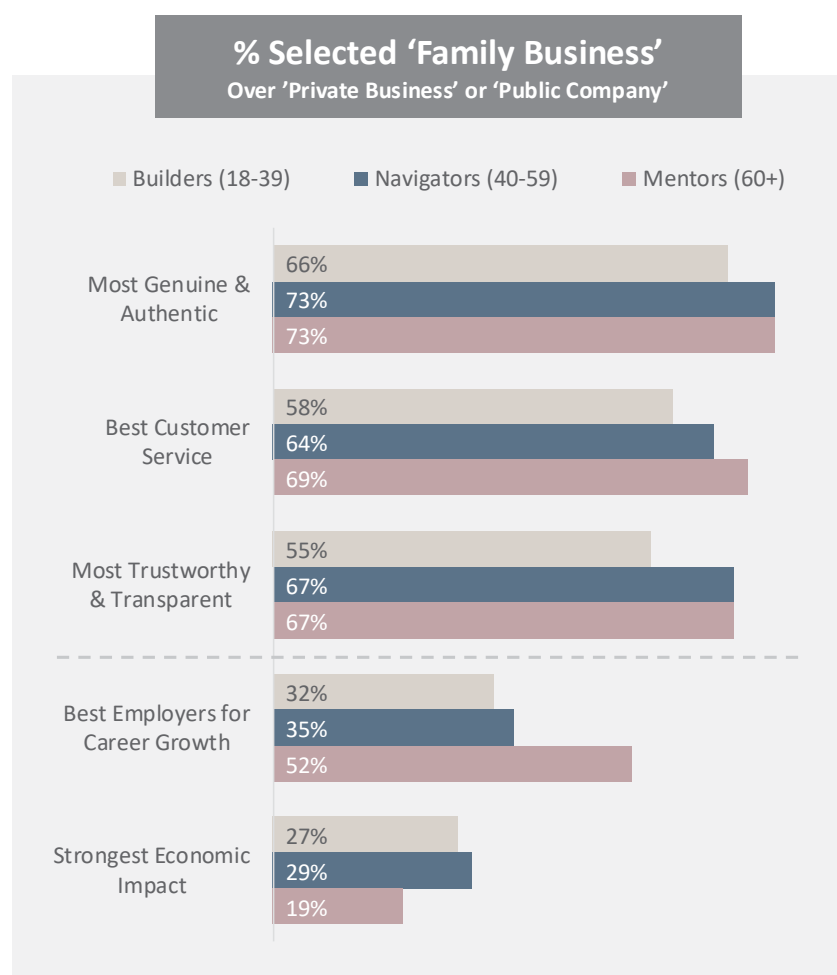
Encouragingly, younger respondents showed more optimism: 31% of Builders believe family businesses are the best employers for career growth, compared to 27% of Navigators and just 19% of Mentors. This may reflect shifting expectations, today’s younger workforce prioritizes authenticity, well-being and having a voice in company decisions. These are areas where family businesses can shine if they lean into their strengths.

The opportunity

Family businesses have room to grow their messaging around scale, innovation and upward mobility. For example, spotlighting leadership development programs, employee success stories and the unique flexibility that smaller or mid-sized firms can offer would help close this gap.

Additionally, many family businesses are at the forefront of sustainability, innovation and tech adoption but they don’t always get credit for it. By leaning into proof points, like

Figure 2





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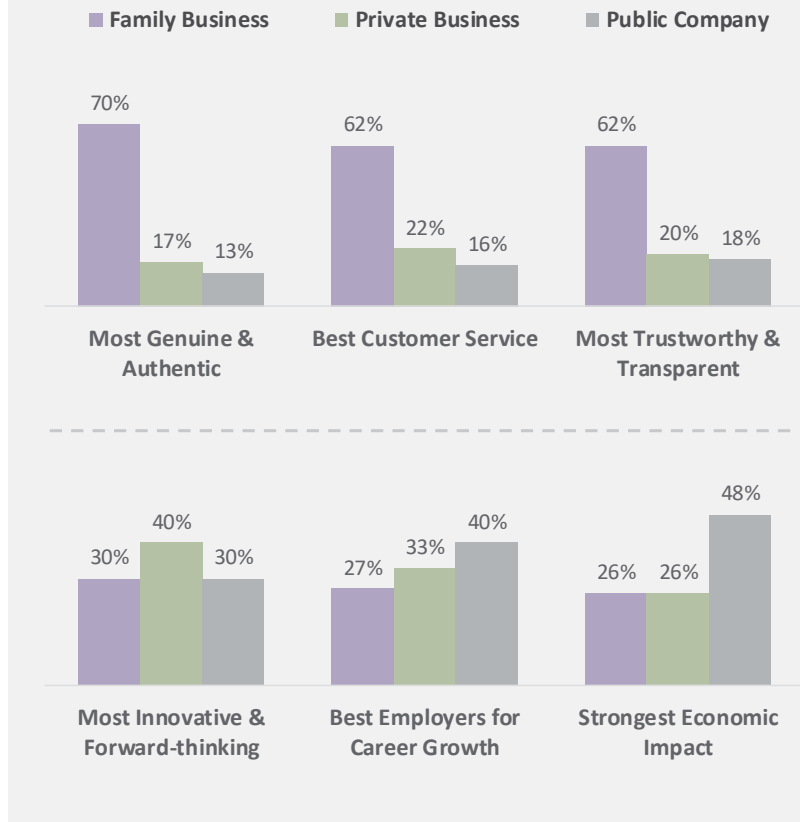


Figure 3

digital transformations or thought leadership in their industries, family businesses can challenge outdated perceptions that they are "small-time" or "old-fashioned."

No matter what the business type, challenges are part of the game. But when we asked, respondents felt that family businesses are more likely to face specific challenges: 84% believe family businesses are resistant to change; 82% believe family businesses are behind the curve on tech with outdated technology; and 79% think family businesses face more internal conflict.

These perceptions echo classic stereotypes: that family businesses are bogged down by tradition, slow to innovate and hindered by family dynamics. And while there's a kernel of truth – tradition can slow adaptation and family ties can blur professional

boundaries – these challenges are hardly unique to family enterprises.

Change management: The assumption is that long-standing family ties and legacy processes create resistance to change. Yet, many family businesses excel at pivoting quickly because decision-making is concentrated in a few key people.

Outdated technology: While budget constraints can play a role, many family businesses are increasingly investing in tech-forward solutions, from e-commerce to supply chain automation, to remain competitive.

Leadership struggles: Yes, family dynamics can complicate succession, but we've seen high-profile power struggles in large public companies too. What's critical is having governance structures in place that ensure professionalism and clarity.


These stereotypes, accurate or not, impact how customers, job seekers

and even policymakers view family businesses. If we don't actively challenge these perceptions, they can limit growth opportunities and erode trust over time. For family business leaders, that means owning the narrative by demonstrating adaptability, innovation and professionalism. Sharing case studies, investing in public-facing tech upgrades and being transparent about leadership succession are all ways to proactively combat these outdated ideas.

A roadmap for action

Our goal with this study wasn't just to gather stats, it was to create a roadmap for meaningful action. Public perception influences everything: who wants to work with you, who buys from you and even who advocates for you in the policy world. The study is available for free download (registration required) at <https://nextgencollaborative.com/family-business-report>.

For researchers, this is a reminder that perception studies must go beyond the surface. It's not enough to know what people think, we need to understand why they think it. That's the only way to design strategies that shift mind-sets and behaviors in lasting ways.

As someone who grew up in and now leads a family business, this project is especially close to my heart. I know many in the marketing research and insights community are part of family enterprises themselves. My hope is that these results fuel new conversations, new strategies and a renewed commitment to telling the real stories of family businesses – the stories that reflect their true value, impact and potential. 

Jenny Dinnen is president and co-owner of MacKenzie and Next Gen Collaborative. She can be reached at jdinnen@mackenziecorp.com.

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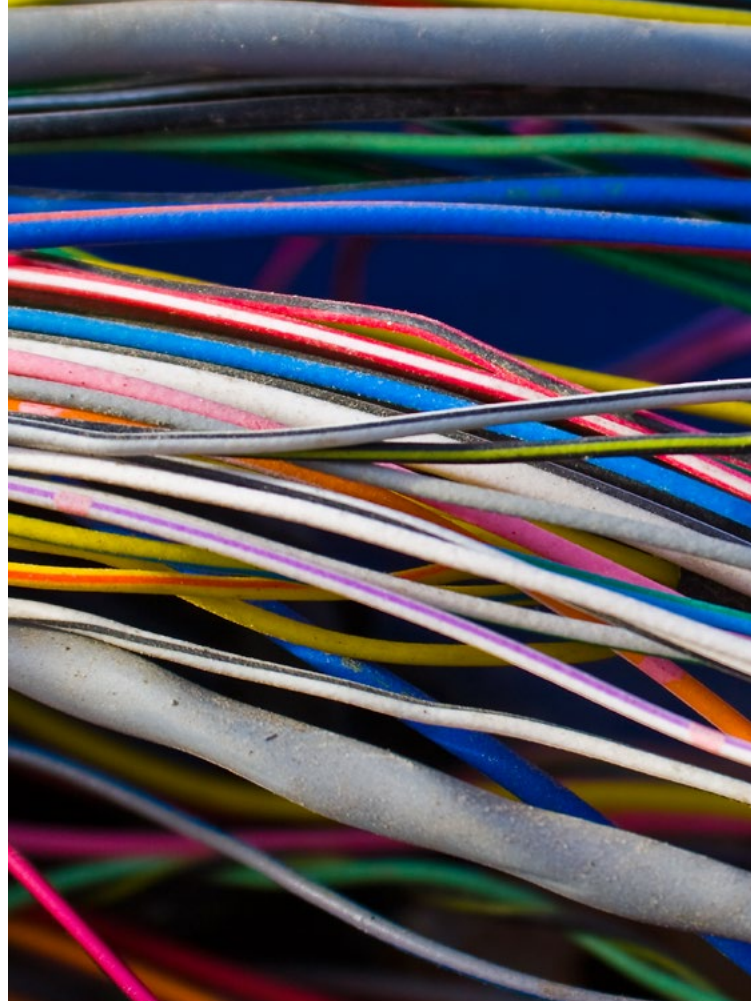


... naming research

Would you buy a car named Wanker?

Why global brands need local research

| By John Hoepfner



abstract

A look at how linguistic screening, cultural evaluation, consumer testing and other research methodologies can prevent costly international brand-naming disasters and guide global brand expansion strategies.

Recently, I posed the question to client working on their first global initiative: "Would you buy a car named Wanker?" While the question stirred some laughs and groans, it highlighted a very real and often overlooked issue in global brand strategy: brand names can go horribly wrong in translation.

A brand name that sounds strong, inventive or clever in one language can mean something entirely inappropriate or offensive in another. For U.S.-based companies expanding internationally, this can present a serious challenge. It raises a crucial question for marketers, strategists and researchers: How do you ensure your brand name performs well across borders?

With 35 years of experience in brand naming, research and strategy, I've seen the risks firsthand – and the costly consequences. In this article, we'll explore how marketing research helps prevent international naming disasters, the core decision companies must make when entering foreign markets (English vs. translation vs. transliteration) and the research tools that support smart, culturally sensitive naming decisions.

The cost of getting it wrong

When Mitsubishi launched Pajero, its tough, off-road SUV, in Spanish-speaking countries, it had to rebrand it to Montero due to the term's slang meaning: wanker. Clairol's Mist Stick curling iron flopped in Germany because "mist" translates to manure. Even Pepsi's memorable slogan "Come alive with the Pepsi generation" caused confusion in China, where it was interpreted as "Pepsi brings your ancestors back from the dead."

These mistakes aren't just embarrassing – they're expensive. Rebranding, product recalls, market reintroductions or even the loss of an entire international market can cost millions.



So why do these mistakes happen? Often, it's because the brand name was never tested beyond its original market. There's a tendency to assume that English works everywhere, or that a strong domestic name will be equally compelling overseas. In reality, that assumption can be the start of a costly misstep.

Three paths for global naming

When taking a brand global, companies must choose one of three core naming strategies:

Universal English name. Many companies opt to keep their English-language name in all markets. This can reinforce a brand's global image and make marketing consistent. Brands like Nike and Apple have succeeded using this approach but it doesn't always work. In some languages, the pronunciation of an English name can sound awkward – or worse, unintentionally funny or offensive.

Translation. Here, the brand name is translated to convey the original meaning in the local language. For example, Coca-Cola in China originally used a transliteration that meant “bite the wax tadpole.” That was quickly corrected to “Ke Kou Ke Le,” meaning “tasty and joyful.” Translation can be powerful when the original name has conceptual meaning but care must be taken to ensure nuance and local idioms are respected.

Transliteration. This strategy involves rendering the name phonetically in another language's script. It works best when the name has little semantic meaning and is meant to sound distinct. However, it still must be evaluated for unintended meanings. A name that sounds stylish in English may carry unexpected baggage when transliterated into Japanese, Arabic or Russian.

When and where to research

Global naming isn't guesswork – it's a structured process that must include targeted research at key points:

- **Linguistic screening:** This first line of defense involves checking the name against multiple languages for problematic sounds, spellings or slang meanings. It should include input from native speakers, not just automated tools.
- **Cultural evaluation:** Even if a name clears linguistic hurdles, it might still fail due to cultural mismatch. Cultural research assesses whether the brand name fits local sensibilities, brand tone and even the competitive landscape. For example, a name that feels bold in the U.S. might seem arrogant in Japan.
- **Trademark screening:** Ensuring the name can be legally protected in each market is critical. Without strong trademark clearance, a company could be forced to change names or risk infringement suits.
- **Quantitative name testing:** Consumer preference research, including quantitative analysis, can validate which names are most appealing and credible in specific markets. It's especially helpful in markets with multiple viable naming options.

Importance of strategic context

Naming should never occur in a vacuum. It must reflect your brand's positioning, audience and distribution model. For example, a functional, value-focused product might benefit from a transliterated name that sounds modern and approachable. A premium product, sold online and in high-end boutiques, might do better with an English name that signals exclusivity.

Likewise, distribution channels matter. A name that sounds fine when read online might be confusing or off-putting when spoken aloud by a local salesperson. If your product relies on in-person selling, pronunciation and tone become even more important.

As an example of the above, a U.S. manufacturer of consumer products approached us to create a name for a new antibacterial product

to be sold globally. The internal team liked the name “Sterix.” It was short, modern and evoked sterility. However, initial research revealed issues:

- In Brazil, the name resembled slang for a medication taken after overindulgence.
- In Germany, the sound was cold and pharmaceutical – misaligned with the brand’s friendly image.
- In Japan, the “x” ending was viewed as overly aggressive for a household product.

Instead, we helped them explore alternative names, ultimately identifying a globally viable option that scored well in linguistic screening, cultural fit and consumer preference tests.

Larger portfolio strategy

As companies grow internationally, the naming question becomes part of a larger portfolio strategy. Should you have one master brand worldwide or allow regional naming variation? Will your product name always appear alongside the parent brand or must it stand on its own?

These decisions affect how much flexibility you have in naming. In some cases, it’s better to allow local adaptations to maintain cultural resonance. In others, consistency is key to brand recognition and recall. There’s no single rule; it depends on your long-term strategy.

Trademark availability and registration

Even the most perfectly crafted and culturally tuned brand name can fail if it’s not legally available. That’s why trademark clearance is a non-negotiable final step in the naming process.

This involves not just a simple database search but a comprehensive legal review in each target market. In some countries, trademark-squatting is a known issue, where local entities register Western brand names in hopes of selling them back or blocking market entry.

Working with trademark attorneys familiar with international law is essential. It’s also important to assess how your name will appear visually in different scripts such as Cyrillic, Arabic

or Chinese characters and whether those visual identities can be protected.

Filing for trademarks early in the process, even before launch, can prevent costly litigation and ensure smooth entry into new markets.

A name that travels well

Going global doesn’t mean gambling with your brand name. With smart research, cultural insight and legal foresight, your name can resonate across markets without losing meaning – or gaining the wrong one. So next time you’re tempted to skip the research or assume your domestic name will work everywhere, remember: Nobody wants to buy a car called Wanker. With careful planning and the right research, your brand name can go everywhere your business dreams of going – and be welcomed when it gets there. ①

John Hoepfner is president of Brand Name Quest LLC. He can be reached at john@brandnamequest.com.



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Asian American Trendview

Founded 2025 | 8 employees
Amy Siadak, CEO



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Founded 2022 | 22 employees
Mike Wagner, CEO

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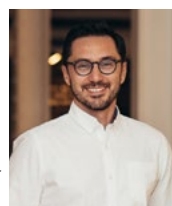


BoltChatAI

Founded 2019 | 50+ employees
Hakan Yurdakul, CEO

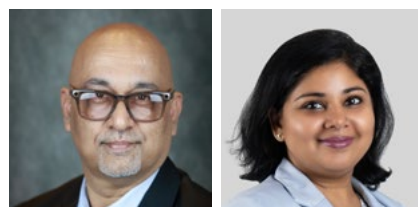
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Founded 2017 | ~100 employees
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Divya Juneja, Managing Partner and Head of Research and Insights



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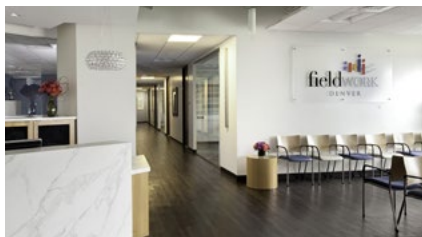
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FUEL Cycle

Founded 2007 | 150 employees
Eran Gilad, CEO

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Founded 2013 | 30 employees
Adam Weinstein and Nate Lynch, Co-CEOs



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Founded 2015 | 375 employees
Steve Orlick, Partner, Americas



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Founded 2009 | 125 employees
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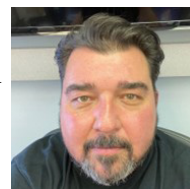


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Founded 2024 | 10-15 employees
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Darren Mark Noyce, Founding Father

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Founded 2024
Clay Colarusso, Head of TeenVoice

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Toluna

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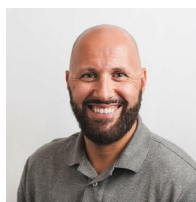
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Vincent Auger, CRO

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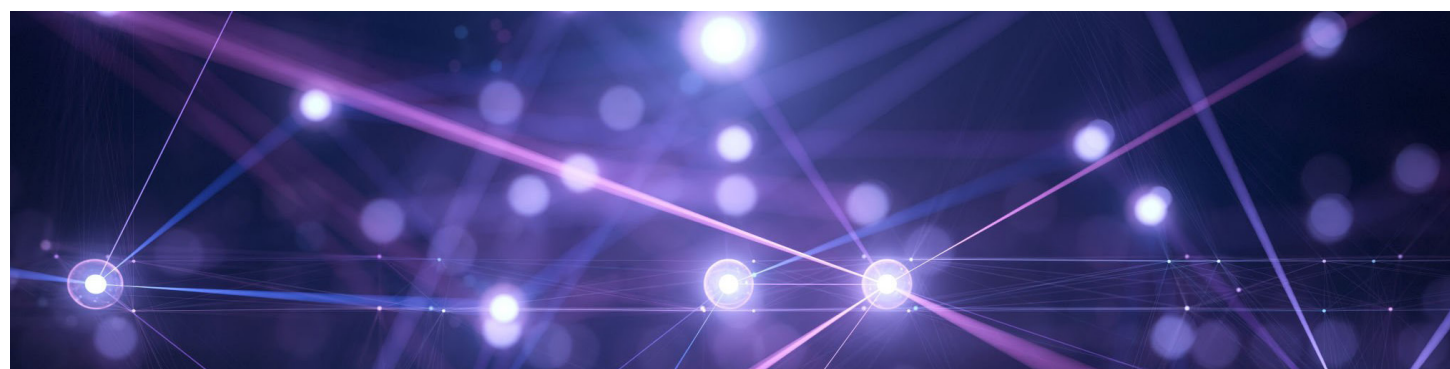
Founded 1995 | 1,800 employees
Audrey Rosen, Vice President, Market Research

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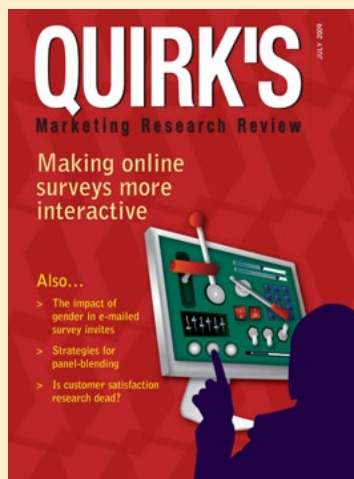
And now – officially launched at the beginning of 2025 – we are introducing our patients and caregivers panel. This panel is recruited from those who are active visitors to the WebMD website. Our market research team leverages WebMD and Medscape members to provide you with solutions that deliver high-quality results. Our Medscape members include such titles as MDs, pharmacists, medical students and NPPAs. We use our advanced targeting capabilities to deliver the HCP respondents and results that you are looking for. In addition to our U.S. coverage, we also have MD coverage in the U.K., Italy, Spain and Germany. For the upcoming WebMD patient and caregiver panel, we are profiling our members on over 400 medical conditions. We provide HCP and patient recruitment and research for both qualitative and quantitative studies.

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QUIRK'S TIME CAPSULE

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Radio, someone still loves you

The Infinite Dial 2009: Radio's Digital Platforms found that AM/FM radio had a big impact on 21% of respondents, ranking second to cell phones (47%). With alternative digital audio options on the rise, the Survey Monitor titled "AM/FM losing out to mobile devices" predicted that radio would have a difficult time competing with iPods and MP3 players.

In 2009, 42% of people aged 12+ owned an iPod or other brand of portable MP3 player and 64% of 18-24-year-olds owned a digital audio player. Thirty-two percent of 12-17-year-olds and 18-24-year-olds pointed to these devices as the reason they were spending less time with over-the-air radio. Yet still today, even with nearly everyone owning a mobile phone, and with streaming platforms and podcasts to compete against, radio listenership endures.

2009

The value of visual innovations in questionnaires

Technology advancements in the early 2000s helped research companies collect higher-quality data while improving the respondent experience. New tools allowed research firms to show their appreciation towards research participants while gathering the information they needed from satisfaction research surveys. In their article "Using interactive technology to improve online questionnaire design," Demitry Estrin and Ted Chen said, "The online medium allows us to break away from the rigidity of the traditional satisfaction survey vehicle."

The article focused on satisfaction questionnaire components that affected the respondent experience. Prioritizing flexibility led to better-quality data since respondents had the option to decide the order in which sections were filled out and allowed them to personalize their overall survey experience. Enhanced visual engagement impacted respondent satisfaction throughout the survey process and their perception of the time it took to complete a survey.

Visual enhancements consisted of what we now consider standard interactive questions. Respondents could slide an arrow to indicate their satisfaction level or drag and drop statements into designated boxes. Interactive surveys today still include similar visuals but the effects have been refined. Many other enhancements have been made as we continue to incorporate tech innovations into surveys that further improve the respondent experience.

Pizza chains were boosting options, not prices

July 2009 Survey Monitor titled "Chains cannot live on pizza alone" highlighted the creative ways pizza chains were broadening their menus. To bolster sales and increase appeal among those who were not interested in pizza, these chains added additional options. Domino's added \$4.99 sandwiches and Pizza Hut offered pasta dishes. Today we've come to expect pizza shops to sell more than just pizza. Domino's marbled cookie brownie or lava crunch cakes, anyone?

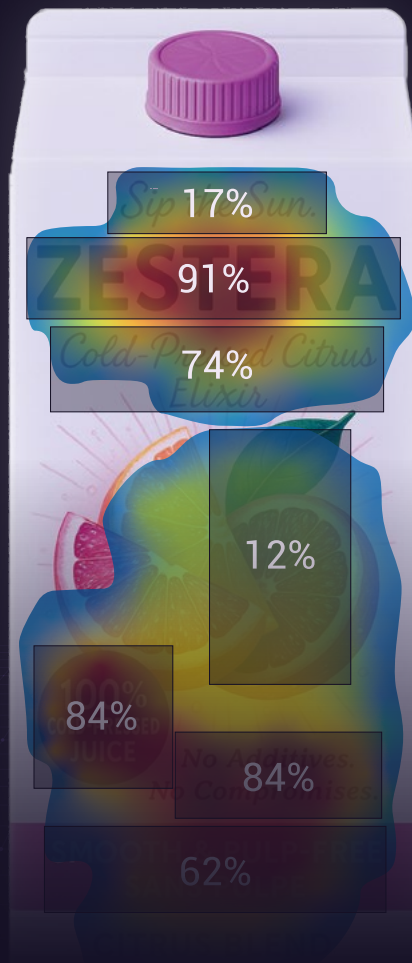
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NRF will host NRF Nexus on **July 14-16**. Visit nexus.nrf.com.

Quirk's Media will host The Quirk's Event – New York on **July 23-24**. Visit thequirksevent.com.

Relx will host Online Retailer on **July 23-24** in **Sydney**. Visit www.onlineretailer.com/en-gb/about.html.

ASA will host JSM Nashville on **August 2-7** in **Nashville**. Visit ww2.amstat.org/meetings/jsm/2025.

Corinium Global Intelligence will host CDAO Chicago on **August 6-7**. Visit metro-chicago.coriniumintelligence.com.

WBR will host eTail Boston on **August 11-14** in **Boston**. Visit etaileast.wbresearch.com.

Forrester Research will host the CX Summit APAC in **August 18** in **Sydney**. Visit www.forrester.com/event/cx-apac.

AMA will host the AMA Summer Academic Conference in **August 22-24** in **Chicago**. Visit www.ama.org/events/academic/2025-ama-summer-academic-conference.

Informa Connect will host Connect Marketplace in **August 25-27** in **Miami**. Visit informaconnect.com/connect-marketplace.

The Research Society will host the Human Insights Conference on **September 2-3** in **Melbourne**. Visit www.researchsociety.com.au/events/conference.

Royal Statistical Society will host the RSS International Conference on **September 1-4**. Visit rss.org.uk/training-events/conference-2025.

IQPC will host Customer Contact Week Asia on **September 2-5**. Visit www.customercontactweekdigital.com/events-customercontactweekasia.

CMO Alliance will host the Chief Marketing Officer San Francisco on **September 10**. Visit events.cmoalliance.com/location/sanfrancisco.

Insights Association will host the Corporate Researchers Conference on **September 9-11** in **Chicago**. Visit www.insightsassociation.org/Events/Event-Info/sessionaltcd/2024LEADERSHIP.

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

WBR will host eTail Connect West on **September 15-17** in **San Diego**. Visit etailconnectwest.wbresearch.com.

Pharma CI Conference and Exhibition will host the Pharma CI USA Conference & Exhibition on **September 17-18** in **Newark**. Visit pharmaciconference.com.

IQPC will host the Responsible AI Summit on **September 23-24** in **London**. Visit www.aidataanalytics.network/events-responsible-ai-summit.

WBR will host eTail Connect Australia on **September 23-24**. Visit etailconnectaustralia.wbresearch.com.

IQPC will host CX Retail USA Exchange on **September 23-24**. Visit www.quirks.com/events/cx-retail-usa-exchange-2025.

Quirk's Media will host Quirk's Media – Data Quality on **September 25**. Visit www.quirks.com/events/quirks-virtual-data-quality-2025.

Quirk's Media will host The Quirk's Event – Global 2025 on **November 18-19**. Visit www.quirks.com/events/the-quirks-event-global-2025.

Quirk's Media will host The Marketing Research and Insight Excellence Awards on **November 18-19**. Visit www.quirksawards.com.

Event details as of May 28, 2025. Please see websites for more details.

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10 minutes with...

Matthew Gardner

Sr. Director, Customer Insights, Portland Trail Blazers



“Don’t let insights sit on a shelf. Bring the voice of the customer to life by sharing findings across the organization and creating visibility for your work.”

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



Can you describe how your team collaborates with other departments across the organization?

Customer insights collaborates closely with nearly every department on the business operations side of the organization. Business operations encompass functions ranging from ticket sales and corporate partnerships to finance and legal affairs. Our team supports departments that rely on fan and customer data to drive better outcomes.

We focus on several key areas: conducting market research to understand fan segments; benchmarking to consistently track the metrics that matter most to our brand; applying a fan-first QA process to products or experiences; and delivering actionable insights – often using AI tools to enhance efficiency and output. This cross-functional support helps ensure our decisions are grounded in a deep understanding of the fan experience.

What excites you most about the future of fan engagement and/or community connection?

I’m closely watching how the TV landscape is shifting across the NBA and sports more broadly. As teams move away from traditional RSNs toward over-the-air and streaming options, this moment could redefine accessibility, engagement and the fan experience. Sports business is considering the fan’s point of view in this space more than ever before.

I’m also excited by how the concept of a ticket is evolving. From flexible ticket plans to the rise of non-seated social spaces in venues, fans now have more control than ever over how they experience a live game.

Do you have any tips for marketing research professionals setting up an insights department from scratch?

Start by aligning on a clear vision and set of goals with stakeholders across the organization – from executives to department leads, and especially with your own team or future hires. Establishing shared expectations early on is key to building trust and relevance.

Next, equip your team with the right tools. Whether it’s access to syndicated data, first-party surveys or AI-powered analysis tools, having the right resources in place will help you deliver value quickly.

Finally, don’t let insights sit on a shelf. Bring the voice of the customer to life by sharing findings across the organization and creating visibility for your work. To measure success, keep things simple: track insights delivered, actions taken and the outcomes that followed.

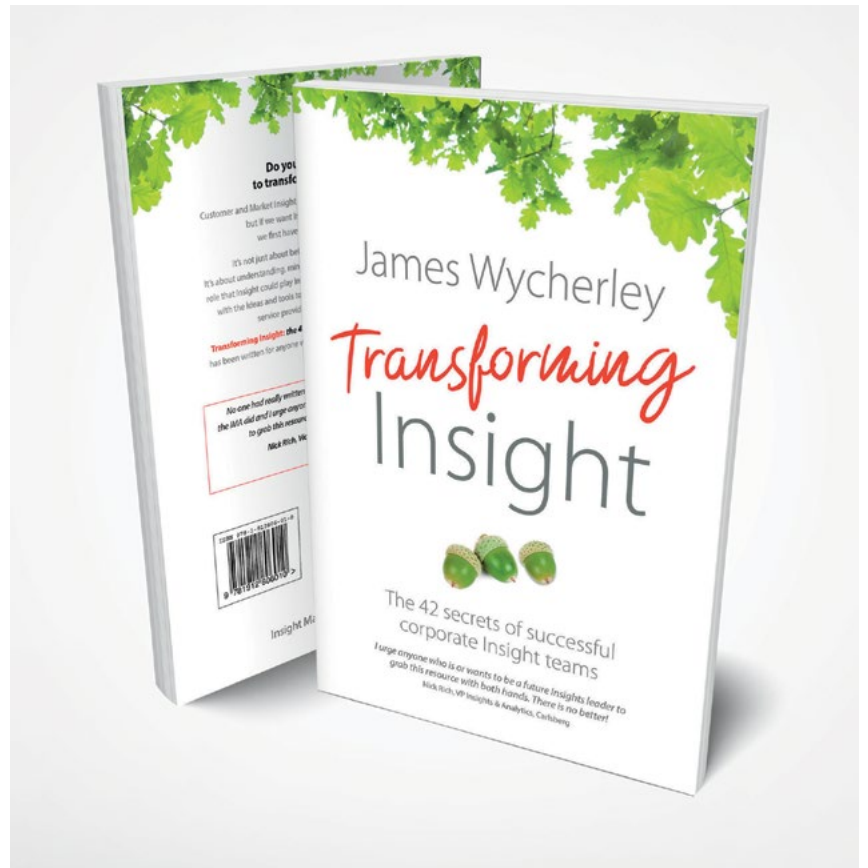
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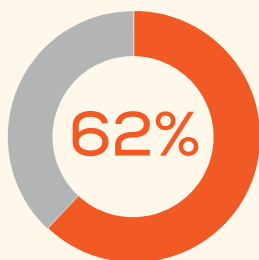
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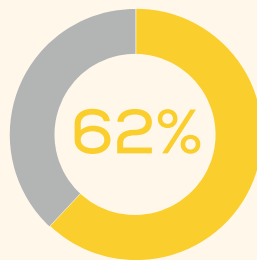


Many students do not have the necessary school supplies to fully engage with classes.

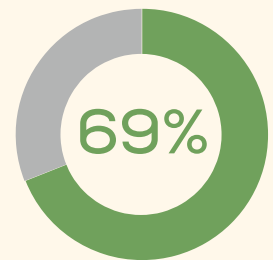
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of students arrived
without the necessary
supplies on their first day



62%
of students did not have
access to necessary
supplies at home



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have second semester
replacement supplies

Source: 2023 Teacher Insight report by the Kids In Need Foundation

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