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For marketing research and insights professionals

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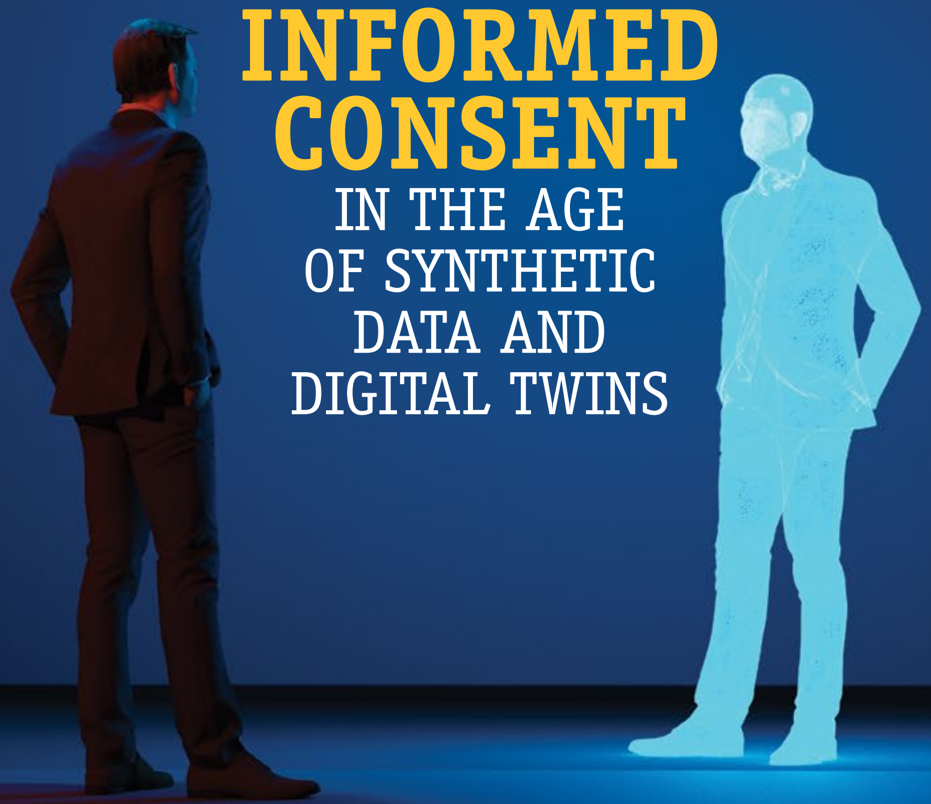
IN THE AGE OF SYNTHETIC DATA AND DIGITAL TWINS



PLUS

Quirk's Marketing Research Review

NOVEMBER/DECEMBER 2025

VOLUME XXXIX NUMBER 6

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

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

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

#facetofacemrx

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

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

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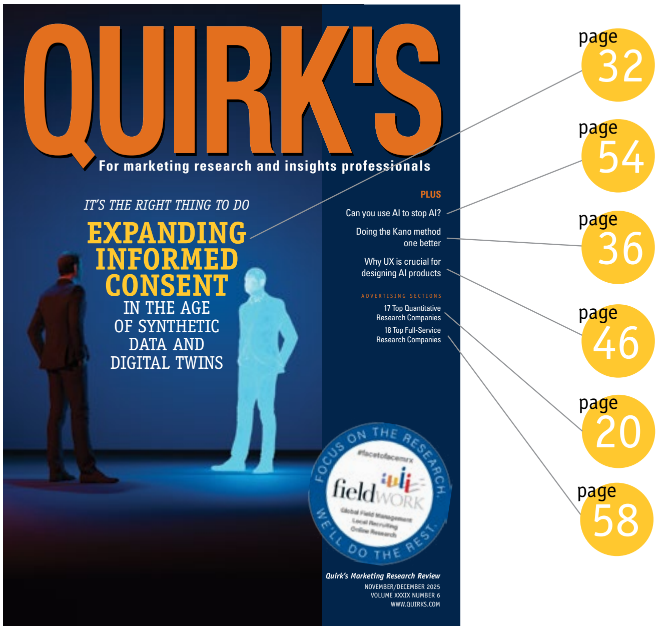

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Call for client-side Quirk's Event speakers

If you are an end-client researcher with a story to tell or tips to share with your peers, consider speaking at a Quirk's Event in 2026! From case studies to best-practice overviews, just about any topic is fair game. And don't worry if you're not on the cutting edge; some of the most popular sessions have been about getting more out of tried-and-true techniques.

Teach your colleagues by speaking at one of our four events – Dallas (March 10-11), Chicago (April 15-16), London (May 6-7) or New York (July 29-30). E-mail Joe Rydholm at joe@quirks.com for more information.

Let Quirk's help spread the word about your news

Does your research firm have news to share with the industry? Maybe you have a staff addition, a headquarters changing location or an updated product/service offering. Send your press releases to news@quirks.com for possible inclusion in our free Daily News Queue e-newsletter.

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The future of insights is predictive

Perspectives from Matt Nelson of Mintel

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CEO, Mintel
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What makes this moment in the marketing research industry so pivotal?

For decades, marketing research followed a familiar path: surveys, reports and retrospective analysis. That still matters, but the speed and complexity of today's consumer world demand something more. We're now dealing with behavioral signals, cultural shifts and AI-driven tools that let us anticipate change in ways we couldn't before. It's no longer just about understanding what happened, but about preparing our clients for what comes next.

Many marketers feel overwhelmed by the sheer volume of data available. How should they approach it?

Too much data can be just as paralyzing as too little. The challenge isn't collecting more; it's cutting through the noise. Marketers don't want another dashboard; they want clarity. They want to know what's shifting, why it matters and what they should do about it. Our role is to simplify complexity into clear, confident guidance.

What does that mean for the role of a research partner today?

It means moving beyond delivering reports to becoming true decision partners. We connect dots across surveys, cultural signals and behavioral data, and stay with clients to interpret and apply those insights. The future is about integrated foresight, helping CMOs and brand leaders move faster and reduce risk by having confidence in their next decision.

Where does AI fit in this future?

AI is transformational, but it's not a magic solution. It's only as powerful as the data and expertise behind it. At Mintel, we combine machine learning with trusted, transparent data and human interpretation. That balance ensures insights are explainable and actionable, not just clever models.

Looking ahead, what excites you most about the road to predictive?

The biggest opportunity lies in foresight; integrating data from every angle and creating environments where brands can test "what-if" scenarios before they happen. The companies that master this won't just react to the future; they'll shape it. And that's the path we're committed to at Mintel.

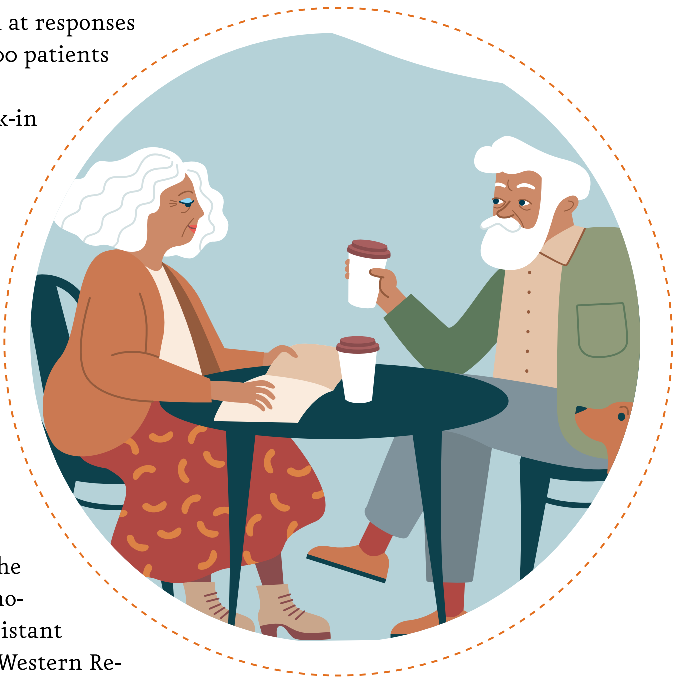
Want your firm to be featured in Insights Q&A? Contact sales@quirks.com for more information.

••• health care research

Seniors want to be social

A study of seniors who visited walk-in care clinics found that while health is obviously a priority in their lives, "social activities and inclusiveness" were cited by nearly half of the respondents, more than double the 21% who listed "health" as a response to the open-ended question "What matters most to you?"

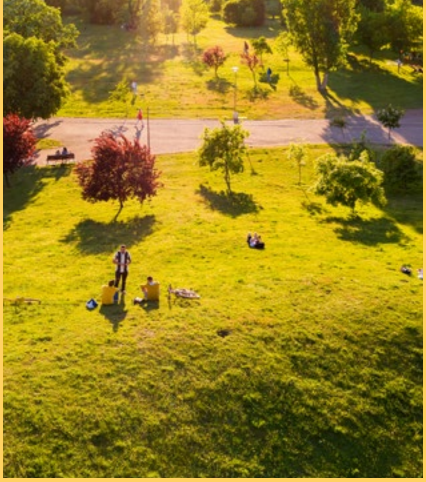
Researchers at Case Western Reserve University looked at responses from about 388,000 patients aged 65 and older nationally at walk-in ambulatory care clinics with the aim of improving patient care and health outcomes by better understanding their preferences and goals.



The clinics want to align a care plan to what matters most to the patient, says Nicholas Schiltz, an assistant professor at Case Western Reserve's Frances Payne Bolton School of Nursing who co-led the research. So, if priorities are independence or being engaged in activities, they may tailor the medications to reduce the risk of falls or they may prescribe mobility aids.

Independence (17%) and family togetherness (10.5%) were the other most-cited things that mattered most to the seniors.

The study, "Patient-centered priorities for older adults in ambulatory care," published by JAMA Network Open, used electronic health records from a national network of walk-in ambulatory care clinics – about 900 clinics in 35 states.



••• urban planning research

If you build it, they will play

The amount a town or city invests in sports-related infrastructure may impact how active the people who live there are, according to new University of Georgia research. Well-designed, aesthetically pleasing urban environments, the study found, affect how likely residents will be to engage in sports.

Researchers from the UGA Mary Frances Early College of Education said this could signal ways communities can make direct improvements on how healthy its citizens are.

For the study, "Staying active in cities: Dimensions of urban built environment and mass sport participation," the researchers surveyed hundreds of urban planners and public health experts, as well as citizens in areas where recent urban sports investments were made. They found that cities with formal, informal or adapted urban sports spaces caused people who lived in them to be more likely to participate in sports.

Those spaces could look like sports complexes with basketball, tennis or swimming pools; stadiums for team play; or even marked trails and waterways for walking or kayaking. No matter their form, there are certain characteristics that lead to healthy outcomes. Among all age groups, 18 to 55, 80% of respondents agreed on the following as necessary for spaces to have: availability, accessibility, design, safety and affordability.

Trade Talk

By Joseph Rydholm, Quirk's Editor

Have no fear, the future is here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Joe Rydholm can be reached at joe@quirks.com

In October I made the short trip from our Minneapolis-area offices down to Chicago's Fulton Market District for the fall summit of the North Central chapter of the Insights Association. The timing wasn't ideal for me, as we were in the production process of this issue of the magazine but I have to admit it was nice to take a break from poring over copy and instead focus on learning from the array of speakers the organizers had arranged for us. (Also fun to be in a different part of the city than Michigan Avenue and marvel at how the Fulton area has morphed from warehouse-land to foodie paradise. I want to go back and eat my way around it!)

Ably filling in for a speaker who cancelled at the last second, Dean West of Association Laboratory articulated something that I had long thought but had never put into words: COVID-19 "kicked us all into evaluation mode." His observation was that, to a certain extent, history is no longer the guide it once was in terms of serving as a predictor of how consumers will act moving forward. The pandemic's upheavals gave us the time and the impetus to examine so many aspects of our lives, from work-life balance (hey, this working from home thing is kinda nice) to shopping habits (pulling up in your car and having your groceries loaded in the back is also pretty sweet) to how we view the government and other institutions like the health care system (when long-trusted sources of guidance fall under siege and also deliver conflicting advice, where do you turn for information to keep you and your family safe and healthy?).

One of West's larger points was that while we have more data than ever, we also now have an unprecedented range of tools – incredibly powerful ones – to make sense of the data and that, with so much exploration and experimentation going on, everyone in the industry is now equipped to play an active role in figuring out what it will mean to be a marketing researcher in the future.

And on that front, Yogesh Chavda of Y2S Consulting flew through a great talk on AI that showcased how much AI can help those who approach the tools it offers with curiosity and creativity. With the goal of getting researchers to start thinking of themselves as "foresight creators," he somewhat echoed West's earlier point about not using the past or data about the past as an indicator of a potential future and to instead use AI tools to help you generate informed sketches of the future. As one of his slides noted, "The real innovation [that AI facilitates] lies in shifting from reactive reporting to proactive strategic architecture."

He urged the audience to get in there and play around with the available AI tools and outlined several things he has tried and how much he has been able to do just as a team of one. Examples of his experimentation included using Zapier to set up a battle between ChatGPT and Claude to compare and analyze each tool's output.

Rather than being intimidated by AI, his message was to "start small and scale smart." He outlined a crawl/walk/run approach to taking 30 days to experiment with the tools, urging us not to aim for perfect but instead to aim for different. The "crawl" task, for example, was to use Claude or ChatGPT as a second analyst to cross-verify patterns and identify missed insights and then measure your success by documenting the time saved and the improvements in the quality of your findings, finishing with a share-out of results with your team to build confidence in the process.

The gathering was joined by students from Dominican University professor Brooke Reavey's marketing research class and in addition to marveling at the group's diversity I enjoyed thinking about the new places they and their peers will be able to take the insights profession, using the curiosity-driven, no-fear attitude that the speakers had outlined. Whatever the future holds, it's safe to say the past likely won't be a guide for what comes next.

INNOVATIVE PRODUCTS & SERVICES

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

Cut hours from survey build and analysis

Import your survey. Launch faster. Summarize in seconds.

Building and analyzing surveys often takes longer than it should. Drafting questions, re-entering them into a platform and waiting for results to be summarized and analyzed can slow projects down.

Methodify is tackling this challenge head-on with the new AI Question Importer that lets you import your survey questions from any Word document. But the innovation doesn't stop there: Methodify's AI summaries synthesize open- and closed-ended responses in seconds, not days, complete with charts and crosstabs that turn data into key insights.

Why teams choose Methodify:

- **Import in seconds:** Upload questions straight from your Word doc.
- **Review and refine:** Check logic, settings and quotas before launch.
- **Launch fast:** Go live in just a few clicks.
- **Analyze and share:** AI summaries, charts and crosstabs ready to export.

From creation through analysis, Methodify's AI streamlines research end-to-end so you can focus on problem-solving and delivering smarter decisions faster.

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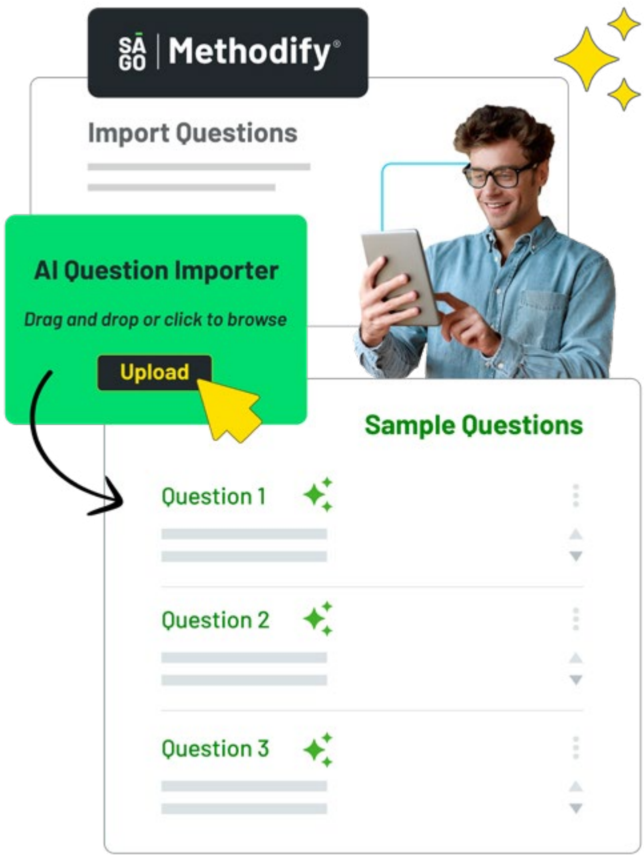

Get trusted consumer insights fast with Qualtrics Edge audiences

Research and insights leaders face an impossible equation: deliver faster, more confident insights while navigating long timelines, unpredictable costs and audience constraints. Traditional methods often lack the speed and precision needed for strategic decisions, leading to missed opportunities.

Meanwhile, skepticism around new AI tools persists – promising speed but lacking the transparent, trustworthy foundation research professionals demand.

AI-powered research that actually delivers

Edge Audiences is a subscription-based research panel solution that delivers trusted insights in hours – or even minutes – by combining AI-generated synthetic data with access to the widest source of global human panels. This isn't just another consumer panel – it's a fundamentally new, mixed-method approach designed for research leaders who need to accelerate decision-making, control costs and maintain confidence in their data.

Already trusted by hundreds of organizations including Booking.com, Dollar Shave Club and Google Labs, Edge Audiences leverages Qualtrics' proprietary large language model to reduce fielding costs by up to 50%, accelerate time to insights and significantly expand audience breadth.

The model is rooted in 25+ years of Qualtrics research expertise and trained on millions of real human responses – consisting of Qualtrics' extensive and aggregated repository of industry-specific human sentiment and experience data.

Unlike other synthetic data providers, Qualtrics provides the methodology, validation approach and transparency needed for confident decision-making – ensuring responses are accurate, secure and reflect evolving consumer sentiment and behavior. In addition, Edge Audiences is flexible by design, allowing researchers to choose 100% synthetic data for fast, lower-stakes projects, 100% human data for high-stakes decisions or a blended approach that perfectly balances speed, breadth and depth of insights. Most importantly, it offers predictable pricing that eliminates cost surprises with simple, credit-based subscriptions that reduce research expenses.

For research leaders navigating today's fast-paced market demands, Edge Audiences provides the speed of AI without sacrificing data quality – delivering the insights researchers need with total confidence.

Learn more about how Edge Audiences can transform research capabilities at www.qualtrics.com/strategy/audiences.

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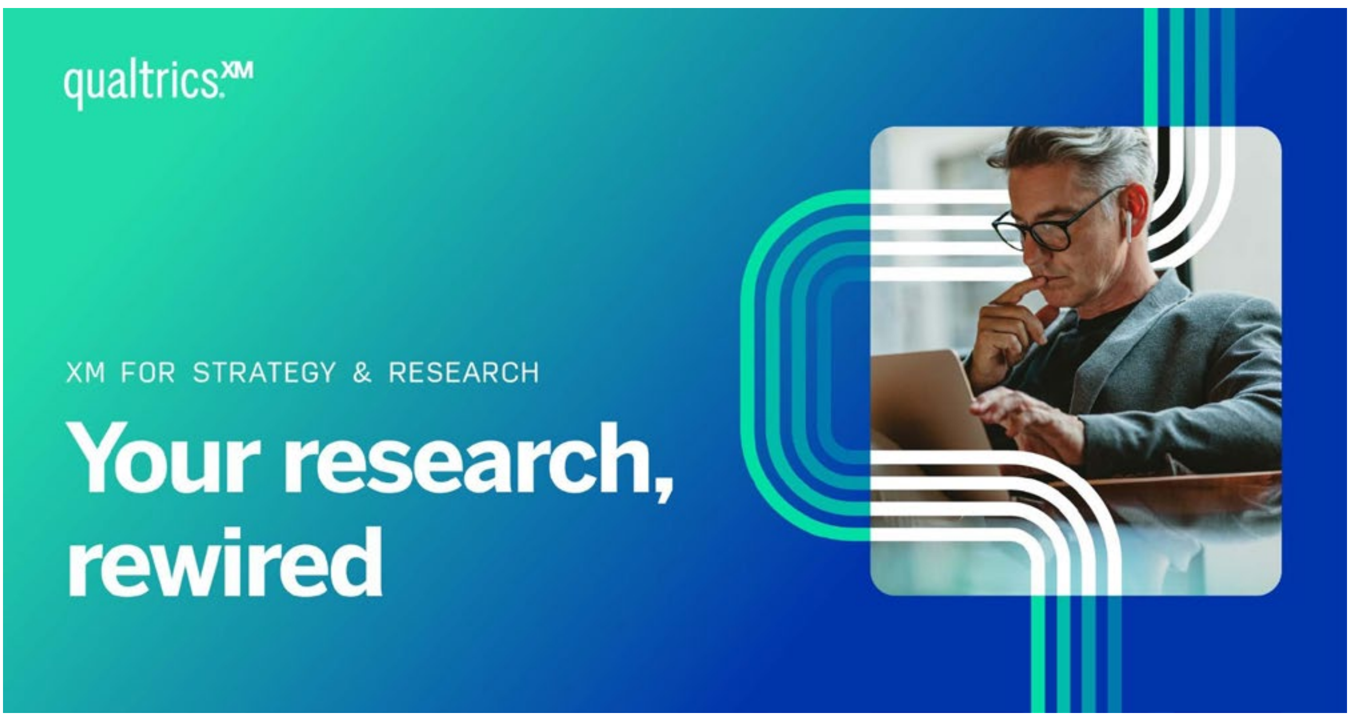

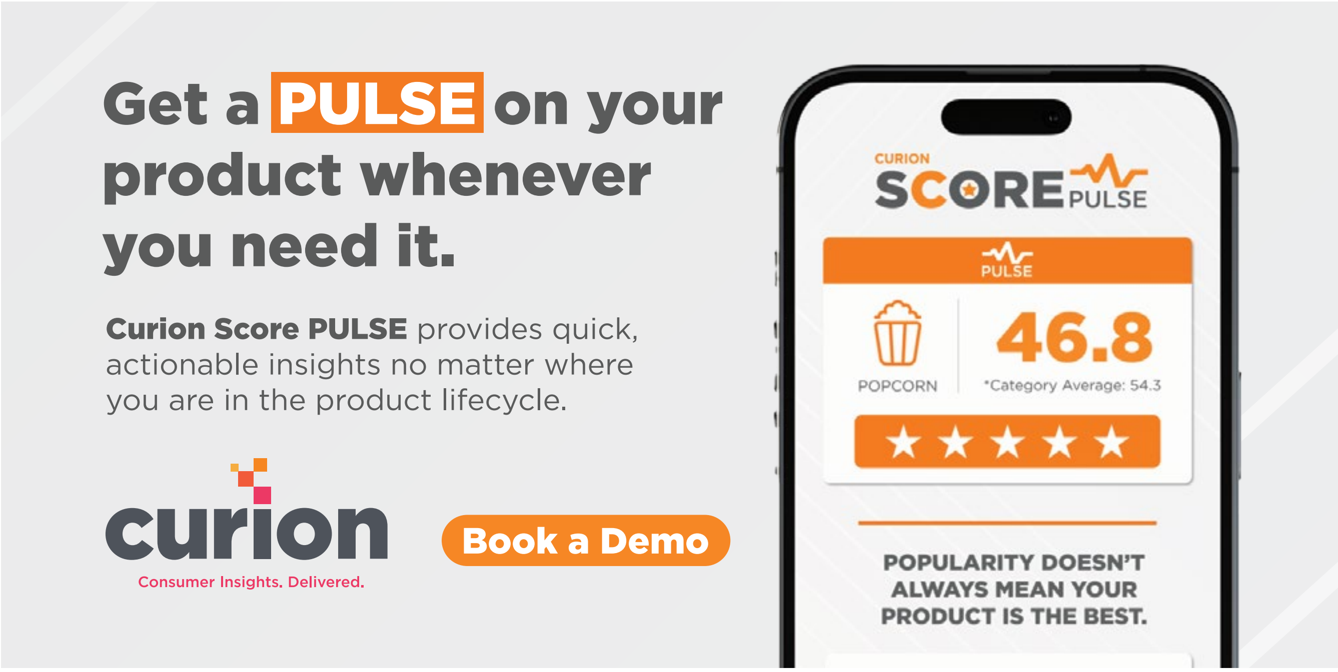

Curion Score™ PULSE delivers fast, reliable insights that drive smarter decisions

In today's competitive marketplace, speed and clarity are everything. Brands don't have the luxury of waiting for months or spending large budgets just to understand how their products measure up. That's why Curion created Curion Score™ PULSE, an agile product insights tool designed to deliver fast, affordable and actionable answers without sacrificing quality or reliability.

Powered by trusted consumer data

Built on the trusted Curion Score™ methodology and powered by 1.5+ billion data points collected across food, beverage, alcohol and restaurant categories, Curion Score PULSE makes category-level benchmarking simple and accessible. In just two days after fielding, teams receive a single, statistically reliable score showing exactly how their product stacks up, eliminating the guesswork and enabling smarter go/no-go decisions.

Go beyond traditional research

Unlike traditional large-scale consumer research, Curion Score PULSE focuses on what matters most: whether your product will succeed with consumers. Consumers first evaluate a single product through a standardized survey. Then, results are consolidated into an easy-to-understand score, benchmarked against Curion's database to provide context and clarity.

Fueling decisions across the product life cyle

Whether you're screening early concepts, fine-tuning pre-launch products, tracking in-market performance or assessing new entrants, Curion Score PULSE provides the speed, flexibility and confidence needed to move forward. By catching potential issues earlier, brands reduce wasted investment and accelerate innovation timelines.

Trusted by leading brands

Major players already rely on Curion Score PULSE to evaluate multiple products across diverse categories, all while staying within budget and timeline constraints. For R&D, brand and leadership teams, the score becomes a shared metric that promotes alignment, drives faster iteration and supports data-driven product strategies.

Simple, actionable, competitive advantage

By combining speed, simplicity and statistical rigor, Curion Score PULSE gives teams the confidence to act quickly without compromising on quality. It puts clear, actionable answers into the hands of the people making decisions, so brands can launch smarter, reduce risk and stay ahead of the competition.

www.curioninsights.com

curion
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Experts at your fingertips

Within the high-stakes arena of global business, timely expertise is everything. INJ Partners connects you to a global network of verified professionals across industries and geographies – delivering the strategic insights you need, when you need them. Our platform streamlines expert recruitment, empowering global companies with reliable B2B intelligence.

Transparency and trust

Clients review detailed expert profiles upfront. This transparent process builds confidence in the match. All experts undergo human verification (including official company e-mail validation) to confirm their current roles. This rigorous vetting ensures every expert is credible and qualified, so you can rely on trustworthy information.

AI-powered identification

Enter a natural language query (like "Directors in Germany, HQ in the U.S."). Our AI-powered search taps into B2B databases (LinkedIn, D&B, Lusha) to instantly filter thousands of profiles and deliver fast, precise results – no endless scrolling or guesswork:

- Use natural-language search for specific roles, locations or industries.
- Gain instant, actionable insights from expert profiles, eliminating guesswork.

Flexible engagement

Scheduling is easy. INJ Partners handles calendar coordination across time zones, connecting you with the right expert at the right moment. Whether it's in-depth interviews, strategic consultations or niche research, we ensure seamless access so projects stay on track.

Smarter, faster, reliable

By combining AI search, human verification and a global network, INJ Partners simplifies expert recruitment. We support complex B2B initiatives, niche market research and specialized consulting by connecting you with people who deliver real insights. With over 30,000 industry experts in 50+ countries (many at director-level or above), you can trust us to bring the right voices into your strategy.

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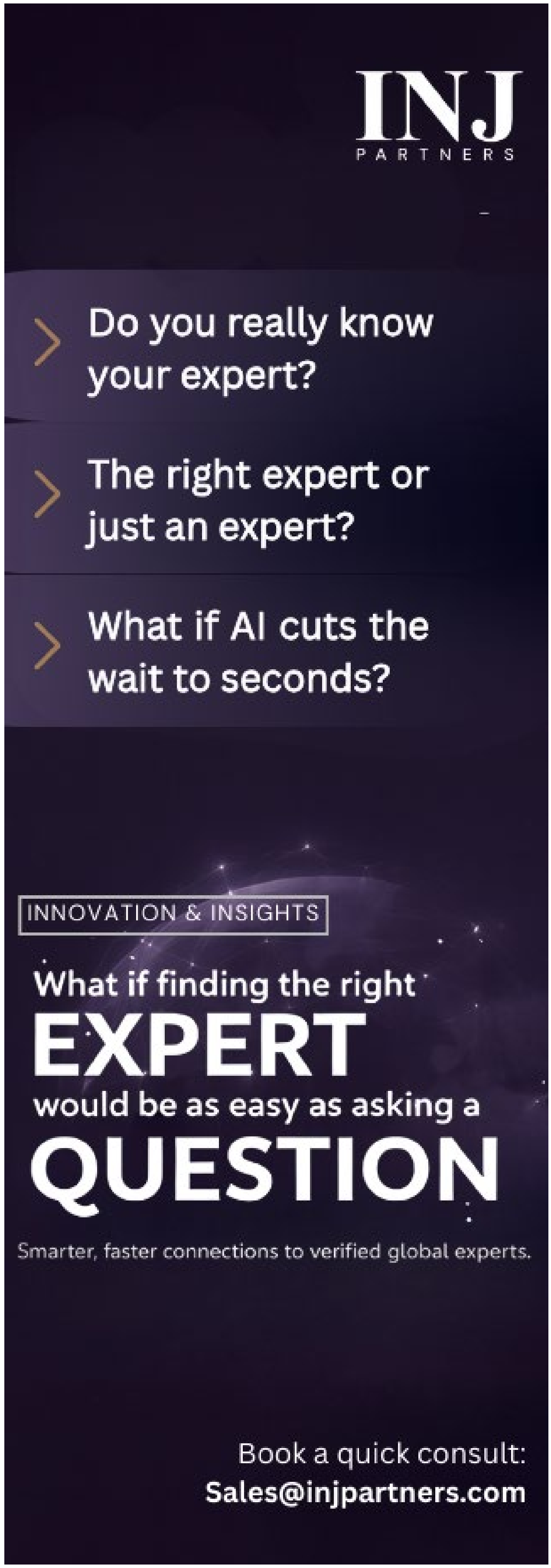

Panoplai: The Human Data Engine

Research has always been fragmented. Surveys in one place, CRM in another, qual transcripts buried in files. Insights get lost and decisions slow down. Panoplai fixes that.

Our Human Data Engine connects every step of modern research in one platform so you can move from questions to answers with speed, depth and clarity.

Five core capabilities power the platform:

- **Survey collection:** Access over 335M+ consumers in 100+ countries for quant and qual research. Validate responses with built-in quality controls to ensure every digital twin starts with accurate human signals.
- **Data ingestion:** Ingest survey results, reports, CRM files and third-party datasets into a unified research hub. No more silos – just a single connected view that keeps your insights complete.
- **Synthetic enrichment:** Fill gaps and expand coverage with validated synthetic personas anchored in real human data.
- **Digital twin creation:** Create digital twins of individuals, segments or full populations. Interact with them directly to test ideas, validate concepts or forecast outcomes instantly.
- **Interactive analysis and reporting:** A built-in reporting tool that transforms survey data, ingested datasets and digital twin interactions into clear, actionable decisions.

The result is faster innovation, smarter marketing and better decisions. Panoplai turns fragmented research into a connected consumer story and transforms every project into a stronger foundation for the next.

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QUIRK'S IN FOCUS

A digest of survey findings and new insights for researchers

••• education research

What comes after the cap and gown?

High school students consider future paths

A nationwide survey from American Student Assistance (ASA) of 3,000+ students in 7th-12th grade gives insights into teens' plans after high school. Teens' interest in college is down while nondegree paths are on the rise. Nearly half of all students say they aren't interested in going to college, with just 45% saying two- or four-year college was their most likely next step. Meanwhile, 38% of teens say they were considering trade or technical schools, apprenticeships and technical bootcamp programs, although only 14% say that such a path is their most likely next step.

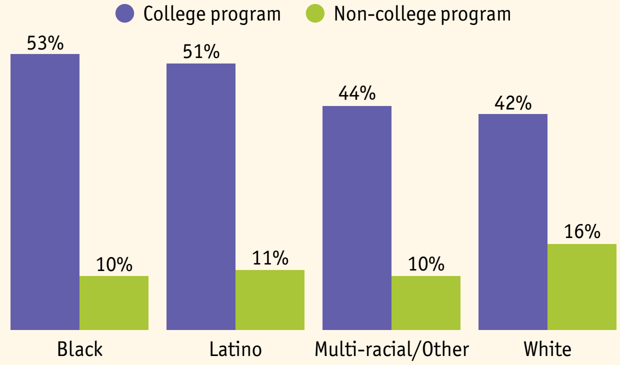
Parents are one of teens' biggest influencers – and they're skeptical of nondegree options. A vast majority (82%) of teens say their parents agree with their plans to go to four-year college, while only 66% said parents supported plans to pursue a non-degree route. In fact, teens reported that parents were more supportive (70%) of foregoing education altogether right after high school vs. pursuing a non-degree program. Nearly one-quarter (23%) have no immediate plans to continue formal education or training upon graduation. Teens not planning to continue education after high school indicated they were thinking of beginning full-time work, entering a family business, starting their own business or joining the military.

Teens, and especially middle schoolers, are feeling better prepared to plan their futures. In recent years policymakers, educators, employers and other stakeholders have pushed to make career-connected learning a more prominent feature of our education to workforce system. Survey results say it's paying off. Agreement with the statement "My school provides me with the right resources to plan for my next steps after high school" grew from just 59% in 2018 to 63% in 2021 and to 82% in 2024. Notably, the largest increase occurred at the middle school level, where confidence in in-school planning resources jumped from 60% in 2018 to 90% in 2024.

Boys and girls are equally interested in college when they're in middle school but by high school, more than half (53%) of girls say they're likely to attend college compared to just 39% of boys. The gender gap is smaller when it comes to non-degree pathways: 15% of high school boys say they will likely attend vocational/trade school, participate in an apprenticeship or take a certificate program, compared to 10% of high school girls. Urban teens were least likely (39%) to say they plan to go to college. Suburban teens are much more likely to plan to attend a college program (64%), while 46% of rural students planned on attending college. More than half (54%) of Black teens and 51% of Hispanic youth are planning to go to college, compared to 42% of white teens.

This report summarizes the results of a quantitative online survey of U.S. youth ages 13-18 in 7th-12th grade. The study was fielded in December 2024 with 3,057 total respondents.

Most likely education plans, by race/ethnicity



••• financial research

Kids' buy-now clicks cost parents

Families struggle to teach financial responsibility

Families across America are learning the hard way that the "click to buy" culture isn't just draining adult wallets. A new survey by personal finance company Achieve reveals that 31% of parents have caught their kids making unapproved online purchases. This surprise spending costs parents $170 on average, while 19% of parents report costs of over $300 – proof that small clicks can snowball into big expenses.

The study of 2,000 parents of children 18 and under was conducted by Talker Research. It paints a broader picture of how children interact with money and how families struggle to teach lasting lessons about financial responsibility. Parents reported that these surprise charges aren't limited to video games and fashion items. Some kids went bigger, buying computers, smartphones, smart watches, cameras and even dabbling in stocks and cryptocurrency. The findings underscore the financial blind spots created by a generation of kids growing up with instant digital transactions.

When kids overspend, parents most often start with a conversation (56%) but some resort to taking away a device (23%) or demanding repayment (20%). Sixty-five percent of parents always require their kids to ask before making online purchases, while 11% of parents report they rarely or never require permission. When asked to compare their children's level of financial responsibility to their own at the same age, 39% of parents say their children are more responsible, 18% say their children are less responsible and 43% believe it's about equal.

Despite the risks, many parents admit they aren't monitoring their kids' financial habits closely. Almost one-quarter (23%) rarely or never check their child's debit or credit card activity, while 11% say they rarely or never require permission before digital purchases. At the same time, most parents recognize the educational gap, with 44% admitting it's harder to teach financial lessons with digital money than with physical cash.

Families are trying, but often failing, to use allowances as teaching tools. More than half of parents (57%) give their children a regular allowance, usually paid in cash (73%). The typical monthly payout is $119, but 14% of kids receive more than $250. Despite those budgets, overspending is widespread. Only 12% of parents say their kids never exceed their allowance.

While over half (56%) of parents respond to unapproved spending with a conversation, parents also turn to firmer steps, including returning the purchase (27%), confiscating a device (23%), grounding (21%), demanding repayment (20%) or freezing account access (11%). Yet two-thirds of parents (66%) admit they'd relax if they believed their kids understood the value of money and 61% even wish a financial expert could step in to teach healthy spending habits.

Talker Research surveyed a nationally representative sample of 2,000 American parents with a child aged 18 and under living at home. The survey was commissioned by Achieve and administered and conducted online by Talker Research between April 14-23, 2025.

••• restaurant research

It's about more than just the food

Diners want a dash of experience with their meal

While diners still crave warmth and connection from their dining experiences, they also expect seamless personalization, smarter booking experiences, offerings that extend beyond the dining room and tailored marketing that speaks to them, not at them. From AI-assisted reservations to Google-driven discovery and luxe, experiential add-ons, operators are embracing automation not to replace, but to enhance the human experience, finds marketing and operations platform SevenRooms.

Ninety-four percent of diners use online resources, like Google, social media and media sites, to discover new restaurants. While 69% of Gen Z rely on social media for discovery, only one in 10 consumers use influencers for recommendations, signaling a shift away from influencer-driven discovery. Google is a top discovery channel for consumers, with 58% of operators investing in Google Ads and 50% investing in organic Google strategies, like SEO, in 2025. Seventy-four percent of consumers are comfortable using AI in the restaurant booking experience, yet most operators haven't adopted AI for the booking experience, creating a sizable innovation gap.

Eighty-three percent of diners are willing to sign up for restaurant marketing programs but want more than a discount – they expect VIP treatment. Forty-seven percent say the top perk they want from restaurants is birthday and anniversary promos, followed by exclusive offers or early access to events. Text is becoming a dominant channel for real-time engagement, with 48% of consumers preferring connecting with restaurants via text.

E-mail is still a top choice for promotions, menu updates and special events, with 62% of consumers preferring to connect with a restaurant via e-mail. Operators are embracing personalization, but 77% still face barriers, with their biggest challenges being tracking performance (35%), ensuring a consistent experience across locations (31%) and knowing who and how to personalize for (28%).

Despite economic challenges, consumers are willing to pay a premium for special events and experiences, with 74% saying they plan to or have already returned to a restaurant after a unique experience. They are willing to pay more for personalized experiences, including curated appetizer platters (62%), customized tasting menus (59%) and commemorative menus or special-occasion keepsakes (57%).

Experience-led programming is driving repeat visits and revenue, with consumers saying they'd pay more than a typical meal for holiday menus/celebrations (63%), tasting menus (55%), live music/dance (53%) and cooking classes (51%). Restaurants are opening new revenue opportunities with upgrades during the booking process, including scenic views, premium drink options, tasting menus, flower bouquets, chocolate truffles and other items. However, basic hospitality is back in, with 25% of diners saying their most valued staff interaction is a simple "welcome back."

Eighty-seven percent of consumers would buy a non-meal item from a restaurant. Popular items consumers would buy include pantry items like spices or dried pastas (36%), food subscriptions for cheeses or frozen items (23%), at-home meal or cocktail kits (22%) and cookbooks (21%).

Forty-nine percent of operators use online reviews to determine their ideal guests and 59% use reviews to evaluate guest perception. Thirty-five percent of consumers say design and ambiance directly impact their connection to a restaurant, enhancing the in-service experience and increasing repeat visits. Restaurants are rethinking loyalty through branded experiences and storytelling, moving towards greater personalization to build deeper connections.

Seventy-nine percent of operators are already using AI, with 99% using AI seeing benefits, including faster response times to guest inquiries (48%), quicker decision-making (47%), reduced operational costs (39%), increases in guest satisfaction rating (38%) and greater team efficiency (37%). AI is helping reduce time spent on reading and responding to guests by 27%, freeing up teams to focus on in-person experiences.

SevenRooms partnered with Censuswide Research to survey 1,000 U.S. consumers from December 12, 2024-January 6, 2025. It also surveyed 257 U.S. operators from December 24, 2024-January 15, 2025.

••• shopper research

Two differing views of the same economy

Shoppers are stressed, retailers are sanguine

Consumers are becoming hyper-aware of pricing. More than half (55%) of consumers plan to prioritize products with the lowest prices when shopping in the coming months, while only 5% of retailers think shoppers will choose to trade down to lower-quality products and less expensive brands than the ones they're accustomed to, finds shopping platform Rakuten.

Retailers understand that shoppers will prioritize price but they believe that brand loyalty will remain intact. Thirty-three percent believe that shoppers will look for ways to save and stack incentives to continue purchasing their preferred brands. An additional 32% believe that shoppers will shift to discount retailers that feature their favorite brands.

Consumers are struggling with their everyday purchases, impacting the opportunity for retailers to engage shoppers and drive revenue. Nineteen percent of consumers say they cannot afford to pay their household bills and 17% cannot afford necessities like food and gas. Only 36% of consumers say they can afford all their daily expenses in addition to non-essential items. Over a quarter (28%) cannot afford personal purchases like new clothing, makeup, electronics and more and roughly two-fifths (41%) plan to shop less than in previous years

Retailers understand that consumers are financially stressed, with 74% saying shoppers are more concerned with the affordability of everyday purchases than last year. Regardless, 73% of retailers were optimistic that they would meet their company's sales objectives for the first half of 2025. This optimism was backed by an increase in spend with 67% saying their marketing budgets increased over last year.

Inflation remains top of mind with most (39%) consumers citing it as having the most impact on their shopping plans. Shoppers remain pessimistic about inflation as 77% believe prices will continue to increase.

Grocery prices have a large effect on how shoppers spend, even beyond the grocery store, with 57% saying that rising grocery prices have caused them to cut back on non-essential shopping. Shoppers are split on how to address rising grocery prices. Forty-one percent are spending more at the grocery store to purchase from the same brands they're accustomed to while 39% are shifting to cheaper alternatives. Thirteen percent say they are completely abstaining from buying products affected by price hikes.

While retailers are sensitive to shopper sentiment and the impact of inflation on household budgets, they believe that shopper loyalty will remain. This is reflected in how retailers are choosing to spend their increased marketing budgets. A majority (83%) say they are prioritizing social media spend, followed by search (65%) and display (50%). Only 36% of retailers are prioritizing performance marketing channels like affiliate to drive sales.

While performance marketing isn't their top priority, this tactic is receiving more attention from retailers this year, with 30% of marketers planning to reallocate some of their upper-funnel budget towards lower-funnel performance drivers. Nearly half (48%) say they will be increasing their spend in offering incentives like loyalty-based rewards and cash back.

These surveys were conducted online by The Harris Poll on behalf of Rakuten. The retailer survey was conducted from March 10-17, 2025, among 101 retailer marketers in the U.S. The consumer survey was conducted from March 6-10, 2025, among 2,058 U.S. adults.

••• small business research

A welcome new team member

How small businesses are using AI

There has been a dramatic shift in how small businesses are embracing AI, with current usage jumping from 39% in 2024 to 55% in 2025. Research from sales and marketing platform Thryv underscores how AI is rapidly becoming a cornerstone of small business strategy, helping owners save time, reduce costs and compete more effectively in an unpredictable economy.

AI adoption is especially strong among companies with 10-100 employees, where usage jumped year-over-year from 47% to 68%. Younger business owners and those in professional services and retail sectors are leading the charge, integrating AI into marketing, customer service and operations.

Eighty percent believe AI is essential to reach new customers and 78% say it's necessary to meet rising consumer expectations for speed and personalization. These perceived benefits far outweigh concerns about data security, which decreased 40% year-over-year.

Among current AI users, 63% use it daily and 33% use it weekly. Top applications include data analysis (62%), content generation (55%), marketing automations (47%) and customer engagement tools like chatbots (46%). Fifty-eight percent report saving over 20 hours per month. The time saved by AI has been used to improve current processes (58%), get new customers (56%), develop ideas to expand business (49%) and develop marketing and other content (42%). Others say they use the time saved to spend it with customers (40%) and employees (29%). Sixty-six percent say AI saves their business between $500 and $2,000 monthly.

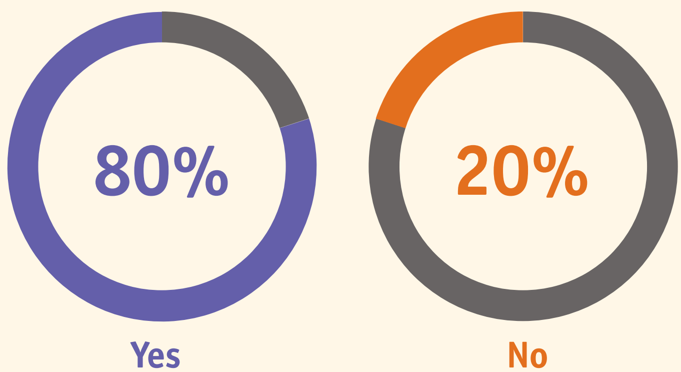
Seventy-five percent of small business owners agree that AI can help improve content marketing, 66% believe it can help by automatically responding to customer reviews and 61% say it can improve customer relations. Forty-nine percent of businesses have incorporated AI in business automation, 29% in social media, 48% in data analysis and forecasting and 48% in content creation.

Two-thirds (67%) agree that AI takes pressure off themselves and their staff. Almost half (46%) say it makes them less reliant on employees. While only 14% of respondents believe AI could replace an employee, nearly half (42%) are open to the idea under the right conditions. As AI adoption levels continue to rise among small businesses, this openness could impact AI's influence on staffing levels.

Forty-one percent of small businesses believe AI will help them navigate economic uncertainty, with another 40% saying it might. Optimism is highest among white-collar and service-based businesses, where over 70% see AI as a strategic advantage. Of those not currently using AI, 52% say they plan to before the end of 2025 and 48% say they will implement it by 2026 or later.

Data was collected from 540 small business respondents between May 4-14, 2025. Respondents are decision makers for their business and are 21+. Respondents have been in business for one year or more, have 1-100 employees and report revenue ranging from $100,000 to $9.9 million.

AI is seen as necessary to reach new customers



Question asked: Do you feel like AI is necessary for you to reach new customers and grow your business?

special advertising section

17 TOP QUANTITATIVE RESEARCH COMPANIES

Quantitative and qualitative research are both necessary when conducting a marketing research project. However, quantitative research may be the best option if you need to gain insights from a large sample of consumers.

Quantitative research providers offer a broad selection of ways to gather the data needed to gain the best insights from your marketing research project. If you need to develop new business strategies or gain a better understanding of your consumer, these companies offer the necessary channels to find relevant and reliable audiences through online or in-person research methods.

Alida

Founded 2000 | 285 employees
Efrem Ainsley, CEO

Alida helps innovative companies capture fast, reliable customer feedback at scale. The Alida Research Platform combines advanced AI with one of the broadest ranges of mixed-method research methodologies. Its quantitative capabilities are powered by a survey engine offering 25+ question types with support for advanced analyses such as TURF, MaxDiff and choice-based conjoint, as well as flexible logic options including least-filled routing, block randomization, scripting and non-linear preview testing. By centralizing research on a single platform, Alida allows organizations to focus on strategy and impact, enabling them to deliver actionable insights that drive innovation, enhanced user experience and brand intelligence.

Phone 1-604-647-1980
www.alida.com

Bellomy

Founded 1976 | 80+ employees
John Sessions, CEO

Bellomy specializes in advanced quantitative research methods and high-touch collaboration with Fortune 1000 companies. Our researchers deploy a spectrum of approaches, from online and phone surveys to in-person intercepts, to test concepts, validate hypotheses, track customer experience, assess brand health and address a wide range of business challenges. Our advanced analytics team uses techniques such as segmentation, conjoint analysis and predictive modeling to deliver enhanced insights. Our proprietary insights platform and AI-driven tools, combined with our expert team, ensure data quality and empower confident, data-backed decisions. Partner with Bellomy to turn data into strategic advantage. Contact justin.bailey@bellomy.com to learn more.

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bellomy.com

CatalystMR

Founded 2008
Adam Berman, CEO

A trusted global panel and market research services leader, CatalystMR's online and telephone research panels are widely recognized for our 40 million+ pre-targeted census-rep consumer, B2B and health care professionals across more than 50 countries. With 800+ profile targets, CatalystMR ensures balanced representative proprietary quality-controlled populations across each panel community. Global B2B targets include SBOs, ITDM, C-level, financial planners, insurance agents; health care professionals targets include physician specialists, nurses and administrators. CatalystMR also provides research support services including survey design and analysis; ad hoc online survey programming and reporting and telephone interviewing field services via a 200-seat multilingual CATI call center. Contact info@catalystmr.com.

Phone 1-800-819-3130
www.catalystmr.com

Decision Analyst

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

Decision Analyst helps clients develop and sustain winning brands. Decision Analyst's specialty is melding in-depth qualitative investigations, strategic survey research, advanced analytics and simulation to solve complex marketing problems. Our services include marketing strategy and strategic positioning research, market analyses, consumption analyses, market segmentation studies, marketing optimization, brand health and tracking research, new product development research (ideation, concept development, concept testing, package testing, product testing, advertising research and new product sales forecasting). We offer an array of qualitative research services to complement and strengthen our quantitative research capabilities. We design and execute marketing research and consulting assignments globally. Industries served include food and beverages, personal care, household goods, OTC medicines, health care pharmaceutical, medical devices, banking and finance, insurance, retail, home improvement and automotive. Decision Analyst is committed to the highest quality standards and maintains certification in ISO/IEC 27001:2022.

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

dobney.com research

Founded 2000
Saul Dobney MBA, CEO

dobney.com research is a premier market research consultancy specializing in strategic insights in the international B2B and technologies space. With over 25 years of experience, we turn advanced quantitative research, including conjoint analysis, pricing strategies and market forecasting, into evidence-led product positioning, market entry, satisfaction and customer acquisition strategies. Our bespoke Cxoice Survey and Insight Systems software empowers clients with actionable data to optimize product and services with deeper insights. Trusted by startups and global multinationals, we provide tailored solutions, interactive market modeling and in-depth analysis focused on real-world solutions to drive winning market strategies.

E-mail research@dobney.com
Phone +44 1633 226 950
dobney.com

Enos

Founded 2022 | 15 employees
Jason Freeman, CEO/Founder

Enos is the first of a new generation of health care panel companies. Partners are turning to Enos because they find it increasingly difficult to secure the recruits they need and are frustrated with the slow launch times and preoccupied status of traditional panels that are more worried about diversifying their services than panel delivery. Enos launches in hours instead of days, offers transparent pricing, reliable feasibility and aligns to your needs like a skilled and focused in-house panel. By providing exceptional care for respondents, Enos delivers the reach and high-quality responses its partners need to exceed expectations for their clients.

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Phone 1-208-406-7509
www.enos.com

Fieldwork

Founded 1980/Insights 1960 | 350 employees
Nikki Darre, President

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

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Harmon Research

Founded 2009 | 125 employees
Stephanie Vincent, Executive Vice President

Harmon Research specializes in delivering high-quality qual and quant insights through online research across 43 countries. Our proprietary panel and advanced online methodologies enable businesses to access reliable data efficiently, supporting confident decision-making in global markets. Our online approach combines quality with efficiency. DataDefense, our rigorous quality assurance program, conducts thorough checks before, during and after digital data collection, ensuring every online insight meets the highest standards. Specialized online tools enhance data accuracy: NoBot, our game-based fraud detection system, eliminates bots through interactive puzzles, guaranteeing authentic online participation. Smart Probing, an AI-driven tool, dynamically generates contextual follow-up questions during online surveys, capturing deeper insights through intelligent digital interactions. This combination of cutting-edge online technology and rigorous quality control allows Harmon Research to deliver comprehensive global insights through streamlined digital processes. Whether conducting quantitative online studies or qualitative digital research, we provide the strategic intelligence companies need to make informed decisions.

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Just The Facts Inc.

Founded 1994
Bruce Tincknell, Managing Director

Quality research at budget-friendly costs! For 30+ years clients have rated JTF's qualitative methods as No. 1 in cutting-edge tools providing rich insights. Our proprietary Qual-Quant™ method is a unique process that provides actionable results. Qual-Quant ™ leverages the best of qual and quant techniques to better assess a product/service's hidden advantages. It's used in both B2C and B2B environments to uncover customers' motivating actions, behaviors and decision-making. Our tool kit uses an array of online, tech-savvy methods taken from both qual and quant that blended together provide the most robust insights. JTF is your "go-to partner" for high-quality qualitative. Your research investment leads to optimal business strategies, achieving stronger sales, profits and ROI. Let's discuss your specific needs, ensuring your initiatives are aligned with customer expectations! WE LISTEN TO YOU! Call today for a no-obligation consultation, or e-mail info@jtfacts.com.

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Precision Research, Inc.

Founded 1959 | 25-49 employees
Scott Adleman, President

Precision Research: Where taste meets insight. At Precision Research, we turn taste into actionable insights. Recognized as one of the nation's premier taste testing facilities, our Chicago-based center combines a state-of-the-art commercial kitchen with a testing environment built for sensory evaluation and product comparison. From recruiting the right consumers to running tests and gathering feedback, we handle every detail so you can focus on the results. Whether you need blind or branded testing, central location or home use studies, our team ensures research that is both food-safe and flawlessly executed. Trusted by top food manufacturers, restaurant brands and CPG innovators, Precision delivers the data and clarity you need to perfect products, win consumer loyalty and stay ahead of the competition. When it comes to understanding what people really want – and why – they'll tell us and we'll show you.

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

QuantifyAI

Founded 2024 | 10-15 employees
Adam Stephenson, CEO

At QuantifyAI, we don't just collect quantitative data – we set a new standard for getting the insights you can trust. From survey design and programming to data prep and analysis, we provide full-service support to guide your quantitative research from start to finish. Our proprietary panel, Opinion Elite, utilizes LinkedIn and Facebook verification with cutting-edge AI and behavioral analysis to validate respondent identities. Our global reach covers B2C and B2B respondents so we can connect you to your most in-demand audiences. No more bots, no more fraud – just real, engaged participants. Partner with us on your upcoming quantitative research, whether it's for brand positioning, pricing strategy, product development or competitive intelligence. Your research deserves better – your insight, our expertise.

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

Quest Mindshare

Founded 2003 | 175 employees
Greg Matheson, Co-CEO Quest Mindshare
Joe Farrell, Co-CEO Quest Mindshare


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

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

Rare Patient Voice LLC
Founded 2013 | 25 full time, 20 part-time employees
Wes Michael, President and Founder

RPV recruits patients and family caregivers of rare and non-rare diseases in the U.S., Canada, U.K., France, Germany, Italy, Spain, New Zealand and Australia for all types of research. We attend patient events and work with 6,000 referral partners to build our panels. Over 180,000+ patients and caregivers across 1,500+ diseases/conditions are in the RPV community. When a client needs hard-to-locate participants, RPV's patient advocacy team can do the outreach to find them. For a bid with feasibility and costs: https://pam.rarepatientvoice.com/; for pricing questions or more information: sales@rarepatientvoice.com.

Phone 1-443-986-1949
www.rarepatientvoice.com

Reckner Facilities
Founded 1991
Gina Cassel, Senior Vice President, Reckner

Celebrating 30 years of market research excellence, Reckner offers state-of-the-art taste test and product testing facilities in the Milwaukee, New York City and Philadelphia MSAs. Spacious, fully equipped test kitchens feature extensive refrigeration and freezer capacity, ovens, microwaves and ample counter space. Our highly-tenured staff are trained in food service and well-versed in the detailed protocols of product preparation and testing, with expertise across categories such as alcohol, confectionery, dairy and frozen foods. Beyond kitchens, facilities include focus group rooms, multipurpose space, product testing rooms and sink booths. Project management teams are experienced in CLTs, home-use tests, large quotas and complex study designs – delivering quick turnarounds with competitive pricing.

E-mail gcassel@reckner.com
Phone 1-215-822-6220
www.reckner.com

SIS International Research

Founded 1984 | 50 employees
Ruth Stanat, CEO

SIS International leads in global quantitative research by using cutting-edge methods and technologies to deliver actionable insights. Our team applies advanced survey design, validation tools and AI-powered analysis to ensure unmatched accuracy and relevance in data collection across the globe, including North America, Latin America, the EU, APAC and the Middle East. With thorough quality control procedures, including metadata screening, AI review and manual validation, we uphold the highest data integrity standards. Our scalable solutions combine global reach with AI and human expertise, enabling businesses in diverse markets to make well-informed, strategic decisions. Trust SIS International for dependable, data-driven intelligence that fuels success on a global level. SIS offers full-service quantitative research from the research design to questionnaire design, fieldwork, analysis and reporting.

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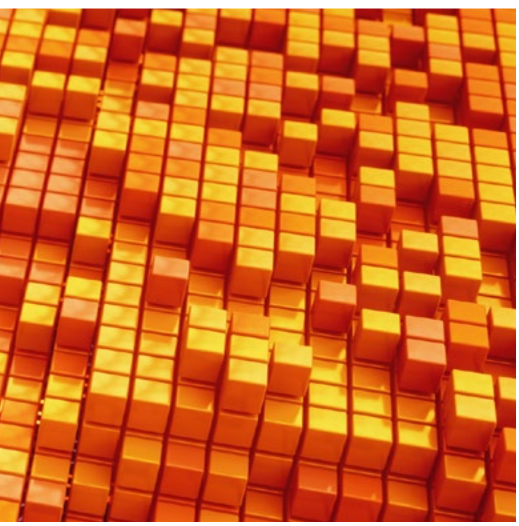

Symmetric, A Decision Analyst Company

Founded 2016 | 25+ employees
Jason Thomas, CEO
Arianne Larimer, President

Symmetric owns and operates American Consumer Opinion®, a worldwide online panel that reaches millions of consumers in 200-plus countries and territories, spanning North America, Latin America, Europe and Asia. Consumers can sign up to become members in one of 11 languages, and complete demographic profiles are maintained for each household. Symmetric also operates five B2B worldwide online panels: Physicians Advisory Council®, Medical Advisory Board®, Executive Advisory Board®, Contractor Advisory Board® and Technology Advisory Board®. Symmetric places a high value on representative samples, scientific sampling methods and advanced fraud-detection systems. Our online panels are carefully balanced, continually refreshed and systematically cleaned. Non-responders, speedsters and cheaters are continually purged. Symmetric provides sample for quantitative and qualitative research and online and offline projects. Additional services include programming, hosting, online communities, tabulation, coding, IHUT mailing and API integrations.

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www.symmetricsampling.com/panels

Touchstone Research Inc.

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

Touchstone Research delivers high-impact quantitative research powered by advanced analytics, rigorous sampling and flexible service models. From brand tracking and A&U studies to ad testing, segmentation and message optimization, our custom surveys provide clear, actionable insights that guide strategic decisions. We specialize in reaching hard-to-reach audiences including kids, teens, Gen Z and global consumers, leveraging proprietary panels and a trusted international partner network. Our tech-forward approach incorporates interactive tools like heatmaps, conjoint and MaxDiff, while ensuring industry-leading data quality. Whether running agile trackers or complex multimarket studies, Touchstone's quant team turns data into powerful narratives that move brands forward with confidence.

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touchstoneresearch.com/quantitative-research

Why the real research risk isn't AI, it's us

| By Jim Nowakowski

abstract

Researchers need to shift focus from "Can AI be trusted?" to "Can we trust ourselves to use it wisely?"

Artificial intelligence is no longer on the horizon – it's here, reshaping the way researchers, marketers and analysts approach problem-solving. And yet, despite its growing presence and potential, AI continues to spark a familiar concern: Can it be trusted?

That's the wrong question.

The real question – the one every responsible professional should be asking – is: How do we ensure that we can trust ourselves to use it wisely?

AI isn't the threat. It's a tool. And like every tool, its impact depends on the hands that wield it.

WHAT AI WON'T DO FOR YOU

To clarify what AI is – and isn't – let's be specific. Here are examples of what models like ChatGPT or Claude will not do: impersonate individuals or organizations; generate medical, legal or financial claims without disclaimers; create false credentials, certifications or survey data; provide or simulate identifiable personal data; or evade platform content policies when prompted for unethical output.

These aren't theoretical boundaries. They're hard-coded into the way large language models are trained and deployed. In real-world use, these guardrails actively prevent – not promote – misconduct. They explain why a prompt is inappropriate, rather than just refusing it.

The issue isn't that AI can invent falsehoods. It's that people can misuse AI to simulate credibility. That distinction matters.

A TALE OF TWO COLLABORATIONS

In the past six months, I've led two complex B2B research projects that used AI in structured, transparent ways. One involved a question-by-question audit of an existing survey study with plans to replicate it this year. The second was a technical analysis of critical research parameters within an industry's product specification library.

In both cases, AI was not the source of truth. It was a lens through which we organized inputs, surfaced insights, challenged assumptions and connected data points across regulatory and technical frameworks. The technology made the work faster, clearer, and – importantly – more defensible.

Better speed. Sharper insight. Greater integrity. Not despite AI – because of it.

FABRICATION IS NOT A FEATURE OF AI – IT'S A HUMAN FAILING

Fake participants are not a new phenomenon. Neither is data manipulation. Fabrication in research has been around long before AI and it has always stemmed from human intent, not software.

People can lie. Researchers are people. Researchers can lie. In fact, many of examples of research fraud have occurred with nothing more advanced than a spreadsheet. If anything, AI has spotlighted these issues – by raising new conversations around auditability, verification and bias that some corners of the research world have long ignored.

WHAT ARE WE REALLY AFRAID OF?

AI hasn't changed that old computing expression about garbage in, garbage out; it's just made it faster. If the prompts are biased, vague or ethically flawed, the outputs will be too. But that's not a failing of AI. It's a failing of process.

What worries me far more than "fake participants" is the very real possibility that fear of AI will prevent capable researchers from using one of the most promising analytical tools in a generation.

We don't need to fear the tool. We need to build better cultures, training and ethical frameworks around its use.

Here's an anecdote that says it all: A few years ago, during a phone interview for a research project on plumbing fixtures, I spoke with an industrial designer. As the conversation evolved, he revealed that he owned a Tesla. I asked him, point-blank: If you had to choose between my client's product and your Tesla, which would you pick? Without hesitation, he answered: "Your client's product – the bidet."

When we played that quote back to the client team, it spread like wildfire. People couldn't believe it. Fortunately, we had the recording.

Today, with synthetic voice generators and AI-driven deepfakes, that same moment could theoretically be faked. But why would anyone do that?

Faking a quote might generate short-term buzz but it would destroy long-term trust. And trust is the foundation of research. It's what makes findings usable. Actionable. Believable.

In short: Truth is still the product.

A warning worth heeding

General Jim Mattis once wrote: "Digital technologies do not dissipate confusion; the fog of war can actually thicken when misinformation is instantly amplified." AI has the promise of making that fog so thick, we lose sight of ourselves as well. But it also has the potential to cut through that fog – if used with transparency, accountability and an unwavering commitment to truth.

So let's have the conversation about research integrity. But let's ground it in lived experience, not fear. Let's build stronger processes, not blame sharper tools.

AI is not the enemy. Misuse is. And the best way to combat misuse is not to avoid the tool but to learn how to use it responsibly – and to demand the same from those we work with.

The real wake-up call isn't about artificial intelligence. It's about what we, as researchers and marketers, are willing to claim as knowledge and how we ensure it earns that name.

There's nothing new under the sun – not even the temptation to misuse a tool. The real test isn't whether AI can be trusted. It's whether we can be.

Jim Nowakowski is president of Interline Creative Group. He can be reached at jim@interlinegroup.com.

Six things marketing researchers can do with random forest analysis

| By Keith Chrzan

abstract

Random forest analysis gives marketing researchers a powerful, flexible tool for driver analysis and segmentation, overcoming collinearity and handling mixed variables to deliver clearer insights, stronger predictions and more actionable marketing strategies.

Random forest (RF) analysis is pretty much the Swiss Army knife of quantitative methods. I've used it more and more over the years, so I thought it might be valuable to show how marketing researchers can use it through the brief case studies below.

What is a random forest? RF is a machine learning method based on, as the name suggests, a collection of trees – in this case a collection of decision trees. A decision tree is a way of segmenting a set of observations so as to create highly differentiated subgroups.

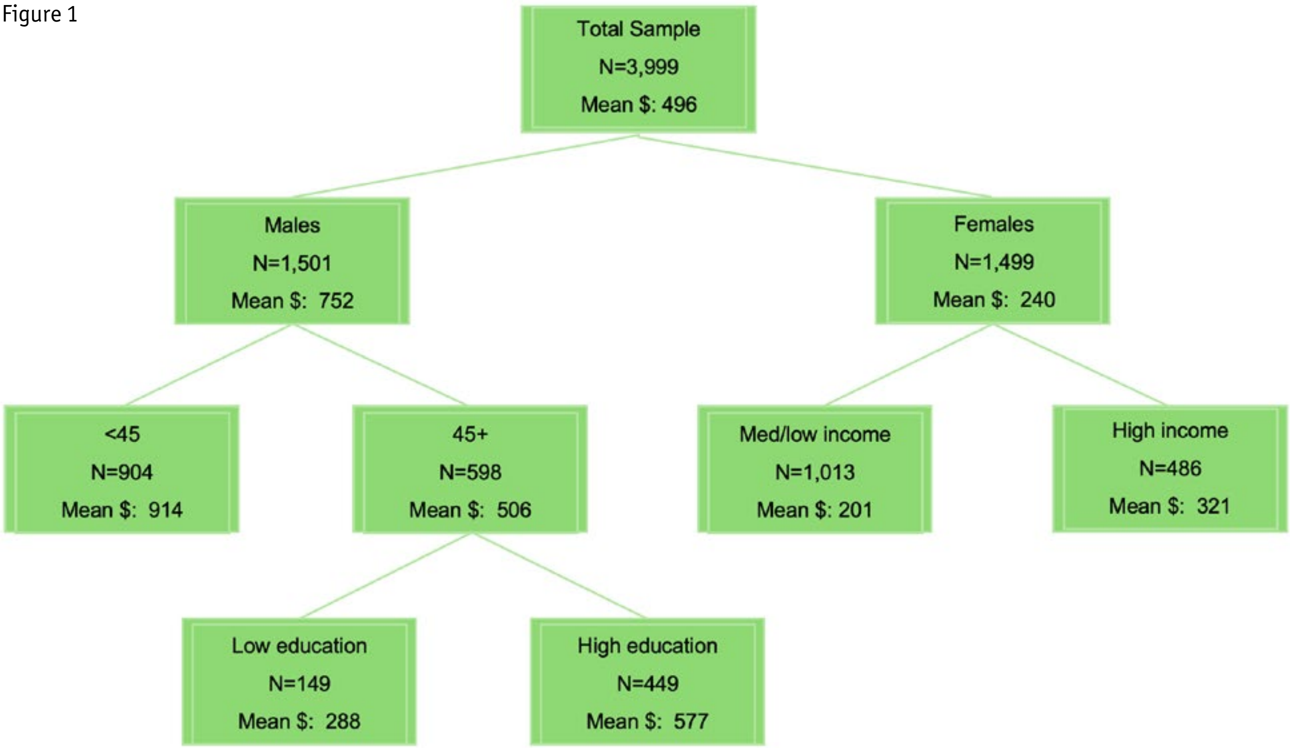
For example, the first decision tree I worked on was to help commercialize satellite TV. I've disguised this example a little, even though it was over 35 years ago. After describing the concept to respondents, we asked them how likely they would be to buy satellite TV and how much they would pay for programming.

The decision tree analysis works by making a sequence of splits of respondents. In our TV case, first it went through all the variables in the survey to find the single one that best split our sample of respondents into higher- and lower-spend groups; this turned out to be whether the respondent was male or female. Then, among the male respondents the analysis searched all the variables and found the one (age) that best split the males into higher- and lower-spend groups. It also looked to find the variable (in this case, income) that best split female respondents into a group of lower spenders and a group of higher spenders. The tree continued splitting the subgroups (older male, younger male, higher-income female, lower-income female) branching more and more, until hitting some stopping rules (e.g., the groups or the differences between them get to small). The tree looked something like the one shown in Figure 1.

A decision tree can predict pretty well but it turns out that having a bunch of trees can predict even better than having just one. That's where the "forest" part of RF comes in. The "random" part happens because we generate each tree using two varieties of randomness.

First, for a given tree the analysis selects a bootstrap sample of the same size as the original sample (by default, but users can adjust this). Because we draw this sample with replacement, this leaves little over a third (about 37%) of the original sample out of a given tree (the analysis then cleverly uses this holdout sample for validation).

Figure 1



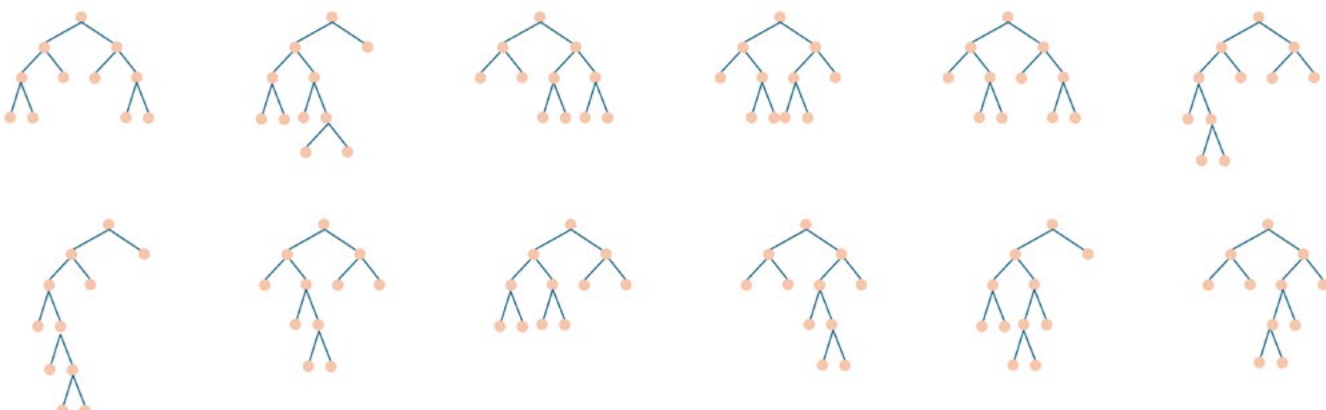
Next, at each branching step, the analysis considers only a subset of the available variables. How big a subset is something we decide upon when setting up the forest. By default the analysis includes one-third of the variables or the square root of the number of variables, depending on whether the forest predicts a metric or a categorical variable, respectively.

So, if the satellite TV study had 3,000 respondents, the first tree would include about 1,900 of them (some more than once, for a total of 3,000) and leave as holdout sample about 1,100 of them. The first branch of that tree might include only 20 of the original 60 predictor variables, while the next branch would include a different 20 predictor variables. And so on for each of the 500 or 1,000 trees we program into our forest. Each tree has a different bootstrap sample of respondents and at each branch of each tree we consider a new random draw of the possible predictor variables. The two randomizing steps are said to "de-correlate the tree," meaning that the forest is less subject to the ill effects of collinearity than any single tree would be.

What we end up with is a forest of these purposely impoverished trees, say like the subset of 12 trees from a larger forest shown in Figure 2.

If it's a categorical variable we're predicting, each imperfect tree gets a vote and we simply count votes to make our prediction. If it's a metric variable, we just average the prediction across trees to come up with the forest's prediction.

Figure 2



Six common uses of RF

With that brief introduction behind us, let's look at some ways marketing researchers can use RF analysis.

1. Driver analysis with mixed or categorical variables

My first experience with RF came when I needed to run driver analysis and I had a mix of metric and categorial predictors. Driver analysis often features correlated predictors (i.e., it suffers from collinearity) which can produce misleading results when we use traditional methods like correlation and regression analysis. Newer methods (averaging over orderings, Johnson's relative weights) largely resolve the collinearity problem for models with metric predictors like ratings, counts and percents. When you have any categorical predictors in the mix, however, those methods struggle. RF doesn't. As noted above, the two randomization steps involved in RF (different subsets of respondents per tree, different subsets of variables considered at each split in each tree) decorrelate the forest and allow it to overcome collinearity. Moreover, unlike the other driver analysis methods, RF is agnostic about whether variables are metric or categorical.

In a concept test a client wanted to know which factors (a mix of attitudes, behavioral counts and percentages and categorical demographics) most inclined survey respondents to report interest in a new product. The RF analysis was able to overcome both the collinearity in the data (there was plenty, especially in the ratings) and the fact that we had a mix of metric and categorical predictors. The RF model produced a set of relative importances, one per predictor. We typically rescale these to sum to 100 for convenient interpretation. The RF could also have produced a predictive model for my client, but the client's interest was only on understanding the drivers, not on using them to predict.

2. Driver analysis with a multi-category dependent variable

It turns out that RF is also agnostic about the scaling of the dependent variable in a driver analysis model.

In a patient chart study, my client collected data from the medical records of three patients from each of 300 physicians, for 900 patients overall. The client wanted to use facts about the physician, the patient, the patient's disease state and history (some 40 variables in all) to predict which of four therapies the physician would recommend. The RF model quantified the relative importance of the variables. Not surprisingly the patient and particularly the disease-state variables turned out to be the most important, much more important than variables describing the physicians.

3. Variable selection for predictive segmentation

The next two uses for the importances that come out of RF involve variable selection for segmentation studies. Variable selection is a crucial, and often overlooked, step in segmentation. Doing it properly solves a complex of problems that plague the segmentation studies produced by inexperienced analysts: the problem caused by masking variables that hide rather than reveal the structure in the data and the (rightfully) spooky-sounding problem named the curse of dimensionality (the curse causes segments to be more similar and less distinct as the number of variables gets larger).

In segmentations where we want the segments to differ with respect to one variable (usually purchase intent for a new product) we like to do predictive segmentation where we include as basis variables for our segmentation analysis only such variables as are correlated with the variable of particular interest.

In a recent segmentation study, we wanted the segments to differ in terms of their level of interest in a new line extension for a successful older product. In addition to purchase intent and other standard concept testing metrics we also collected respondent demographics, their category-specific attitudes and their ratings of some general lifestyle attributes. Using RF, we identified a subset of these (a demographic, five category-specific attitudes and four general lifestyle attitudes) that were highly correlated with the purchase intent. When we used those 10 variables in a latent class cluster analysis (because the demographic variable was an unordered categorical variable, latent class made more sense than distance-based clustering) we found four segments of respondents with very different levels of interest in the line extension. The segments also differed in terms of the 10 basis variables, which gave the marketing team the levers they needed to pull to market differently to the resulting segments.

4. Variable selection for unsupervised segmentation

More often, however, we don't have a one variable of particular interest. In this case we use something called an unsupervised RF. The name may sound like an oxymoron, but it turns out the method isn't really unsupervised at all. First, the analysis makes a copy of the original data set except that it randomly and independently sorts each column of variables. This breaks all relationships in the copied data set. It then labels each record from the original set "1" and each from the copied/broken data set "2." The program then uses this as a dependent variable and runs an RF to distinguish whether a record comes from the original data set or the copied/broken data set. This unsupervised RF analysis quantifies the relationship of each potential segmentation basis variable with the segmentation structure present in the data. By selecting only the most important variables revealed by the RF, the analyst avoids masking variables and the curse of dimensionality at the same time.

A client was considering almost twice as many basis variables as they had respondents in a segmentation study, which they realized was pretty much a red-carpet invitation to the curse of dimensionality. Using an unsupervised RF, we culled the list of 250+ potential basis variables down to a manageable set of around 15. Since there were many possible subsets of variables to choose from the longer list (1.8×10^{75} such subsets, actually) having an organized approach for choosing the best subset prevented a lot of going back and forth trying different subsets of variables, keeping the segmentation study on track and on budget.

5. Creating a similarity matrix as the basis for a segmentation

It turns out that the unconditional RF also produces a similarity matrix of the variables. When you have a mix of metric and categorical basis variables for your segmentation, creating this RF similarity matrix is one way of accommodating the mix of variable types (other methods for handling mixed variable types include latent class models).

Recently a client wanted to segment their market using survey data. Variable selection analyses identified a mix of metric and categorical variables as viable bases for the segmentation. The client requested that we investigate a broad range of potential solutions before deciding which to share with their stakeholders. A latent class segmentation resulted in viable-looking three-, four- and five-segment solutions. We also ran the unsupervised RF and input its proximity matrix to a k-medians cluster analysis program, which gave us viable three-to-six-segment solutions. In the end the client went with the four-segment latent class solution, but as they had specifically requested we come at the analysis from multiple angles, the RF/k-medoids approach helped us out quite a bit.

6. Typing tool creation

Once we've created our segments, we can use RF to build a classification model. RF classifiers tend to be very parsimonious, but instead of producing simple typing equations they need to have new survey data run through the forest, which can limit their applicability (alternatively we can sometimes create a lookup table of every possible combination of inputs and use that for on-the-fly typing).

For example, in a segmentation study we did a few months back, we found that classic typing tools (discriminant analysis, multinomial logit) performed less well than the client wanted: with seven variables we could classify respondents into five segments with 63% accuracy, which rose to 68% if we used 12 predictors. However, with just five variables, an RF classifier had 80% accuracy and with 12 that accuracy topped 95%. The five-variable RF typing tool needed a 16,807-row lookup table (feasible in Excel) while the 12-variable tool required a 13.8 billion-row table, which of course was not so practical.

6a. Building an armada of space robots to defend the Earth from alien invasion

Actually, just kidding about this one – the code for this RF model isn't fully debugged yet.

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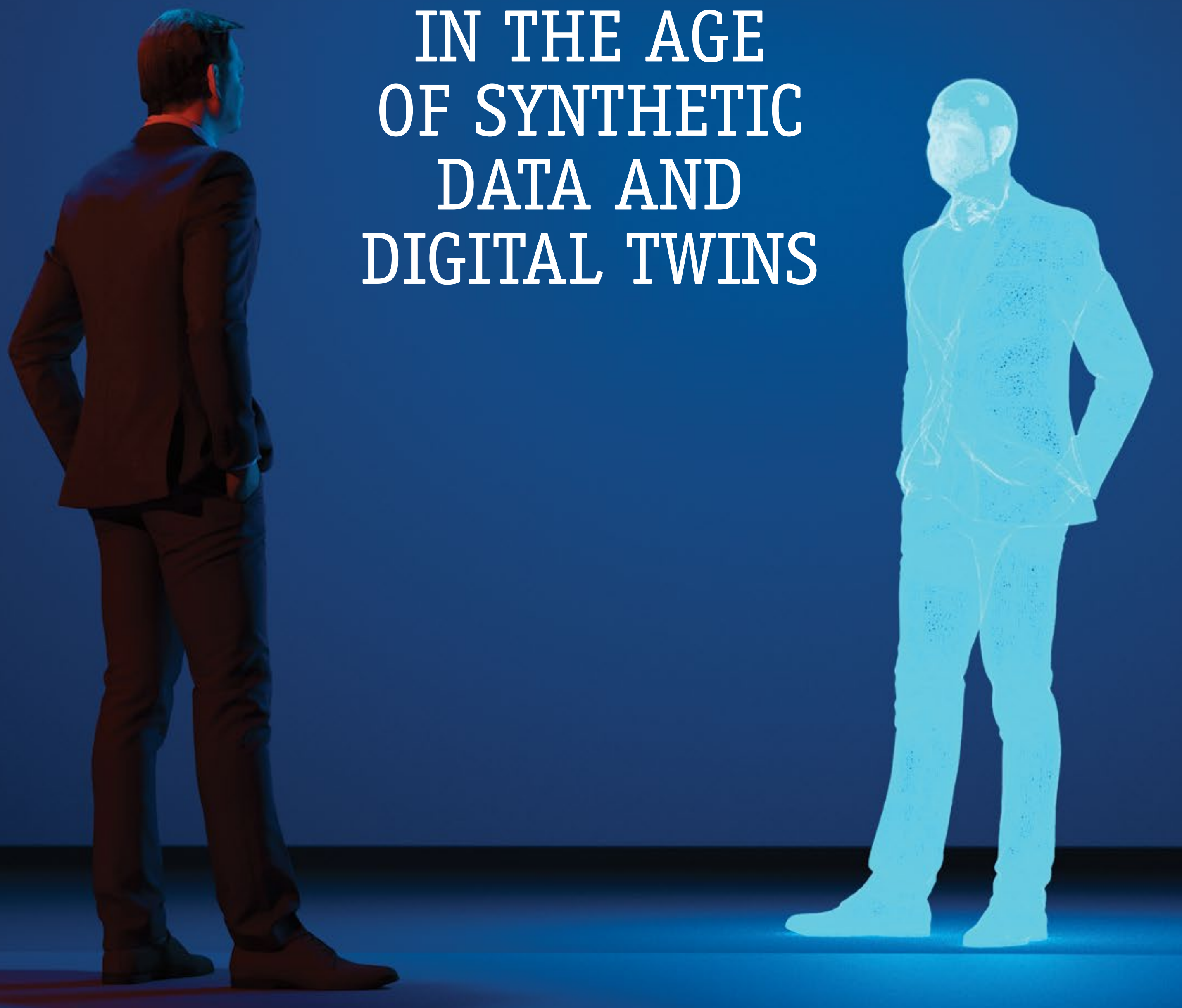
IT'S THE RIGHT THING TO DO

EXPANDING INFORMED CONSENT

IN THE AGE OF SYNTHETIC DATA AND DIGITAL TWINS



AI-POWERED SYNTHETIC DATASETS FUEL FASTER INSIGHTS BUT THEIR CREATION DEPENDS ON REAL HUMAN DATA. RETHINKING CONSENT ENSURES RESEARCH INNOVATION DOESN'T OUTPACE PARTICIPANT TRUST OR ETHICAL RESPONSIBILITY.

By Tracy Tuten

The promise of synthetic data in market research is dazzling: faster results, lower costs, privacy safeguards and the ability to simulate hard-to-reach audiences. With the rise of generative AI and machine learning, synthetic datasets – designed to mimic real human behavior – are now fueling everything from predictive modeling to segmentation strategy. But behind the sheen of innovation lies a growing ethical blind spot: Are we adequately informing participants how their data will be used to train synthetic models, power simulations and even construct data-driven "digital twins"?

As a qualitative methodologist and research strategist, I find myself both intrigued and unsettled by this question. Synthetic data is often positioned as a privacy-protecting solution but its creation depends, paradoxically, on real-world data collected from actual participants. If their contributions are being used not only to support a single study but to teach machines how to mimic human thought and behavior, then the principle of informed consent which is so foundational to our industry must evolve accordingly.

This article argues that the research community must expand its definition and implementation of informed consent to align with the realities of synthetic data and digital-twin applications. We must go beyond vague clauses in privacy notices and create meaningful, participant-centered transparency that earns and deserves public trust.

Synthetic data isn't as detached as we pretend

Synthetic data is frequently described as anonymized, privacy-safe and non-identifiable. On the surface, this is true. Once the data has been modeled and generated, it no longer contains direct personal identifiers. But this framing can be misleading.

Behind every synthetic dataset lies a foundation of real human data – answers, emotions, patterns and preferences that were initially provided with an expectation of bounded use. When we use that data to train AI models capable of generating human-like responses, we're doing more than anonymizing information. We are encoding participant behavior into models that may simulate, extend or replicate that behavior in new contexts for years to come.

This is particularly true when the goal is to develop digital twins – synthetic constructs that mirror the behaviors or decision-making of an individual or narrowly defined persona. While most synthetic datasets aim to represent general population patterns, digital twins are designed to simulate the choices of "someone like you" – or even you, in some cases – based on a full data exhaust of prior behavior. Yet many participants have no idea this is happening.

The ethical imperative: informed consent, reimagined

Informed consent has long been a pillar of ethical research practice. Participants must know what they're agreeing to, how their data will be used and what risks they might face. But current consent practices often fall short when it comes to AI training and synthetic data applications.

Most traditional consent agreements are:

- One-time events rather than ongoing processes.
- General in nature, failing to describe specific AI-related use cases.
- Silent on future uses, such as model updates or deployment in new contexts.
- Grounded in a pre-AI understanding of what "data use" actually means.

This outdated consent structure creates a mismatch between participant expectations and industry practices, undermining transparency and potentially trust. To restore that trust – and ensure ethical rigor – consent must be expanded in scope and reimagined as a dynamic, ongoing process.

Here are the key areas where consent must evolve:

NATURE OF SIMULATION

Participants may believe their data is being used for statistical analysis, not to simulate how someone like them might think, feel or act. They deserve to know that AI models trained on their responses might generate synthetic responses that resemble their own.

CREATION OF DIGITAL TWINS

In some applications, organizations use real data to generate one-to-one "clones" of an individual's behavior profile. This is no longer generic modeling – it's individualized simulation. Consent for this kind of use must be explicit and separate from general research consent.

BIAS AMPLIFICATION

AI models trained on real-world data can inadvertently reproduce or even amplify underlying biases. Participants should be informed that their data might contribute to models that reflect societal inequalities or demographic skew, even if not intentional.

LOSS OF NUANCE

Synthetic data often performs well on factual queries but lacks the emotional depth, social context or personal nuance of real human responses. Participants should understand that their voices may be distilled into something less rich or representative than intended.

FUTURE USES OF SYNTHETIC MODELS

Unlike survey data, synthetic models may live on and be repurposed for new research, simulations or strategic planning. Consent should clarify that participation may have longer-term implications, especially in dynamic systems that update over time.

A checklist for expanded informed consent

To responsibly integrate synthetic data into market research, researchers should revise consent processes to address the following components.

COMPONENT	DESCRIPTION
AI training notification	Clearly state that data may be used to train machine learning or AI models.
Purpose explanation	Explain why synthetic data is being generated (e.g., simulation, segmentation, forecasting).
Data use description	Specify whether data will support group models, data augmentation or 1:1 digital twins.
Bias and limitations disclosure	Acknowledge potential biases and reduced richness of synthetic outputs.
Privacy safeguards	Describe how reidentification risks are mitigated, including use of techniques like differential privacy.
Future-use policy	Explain how long the training data and resulting models will be retained and how they may be used in the future.
Participant control	Provide options to opt out of synthetic data use or model-training participation.
Responsible parties	Identify who is collecting, managing and deploying the data and models.

This level of specificity demonstrates respect for participants' data sovereignty and promotes trust in synthetic data applications.

Regulation, reputation and risk

If acting in an ethical manner isn't enough of a motivator on its own, consider this: Regulatory bodies are paying attention.

- The Federal Trade Commission has taken action against companies that trained models without explicit consent, even if synthetic outputs were used.
- Under GDPR, even pseudonymized data used for AI training may trigger data protection obligations if reidentification is possible.
- The AI CONSENT Act, introduced in the U.S., seeks to mandate clear consent for AI training using consumer data.

Beyond compliance, reputation is at stake. Brands and research providers who are caught misusing participant data – or downplaying synthetic data risks – may suffer credibility losses with clients, regulators and the public. As synthetic data applications accelerate, ethical leadership becomes a brand asset in its own right.

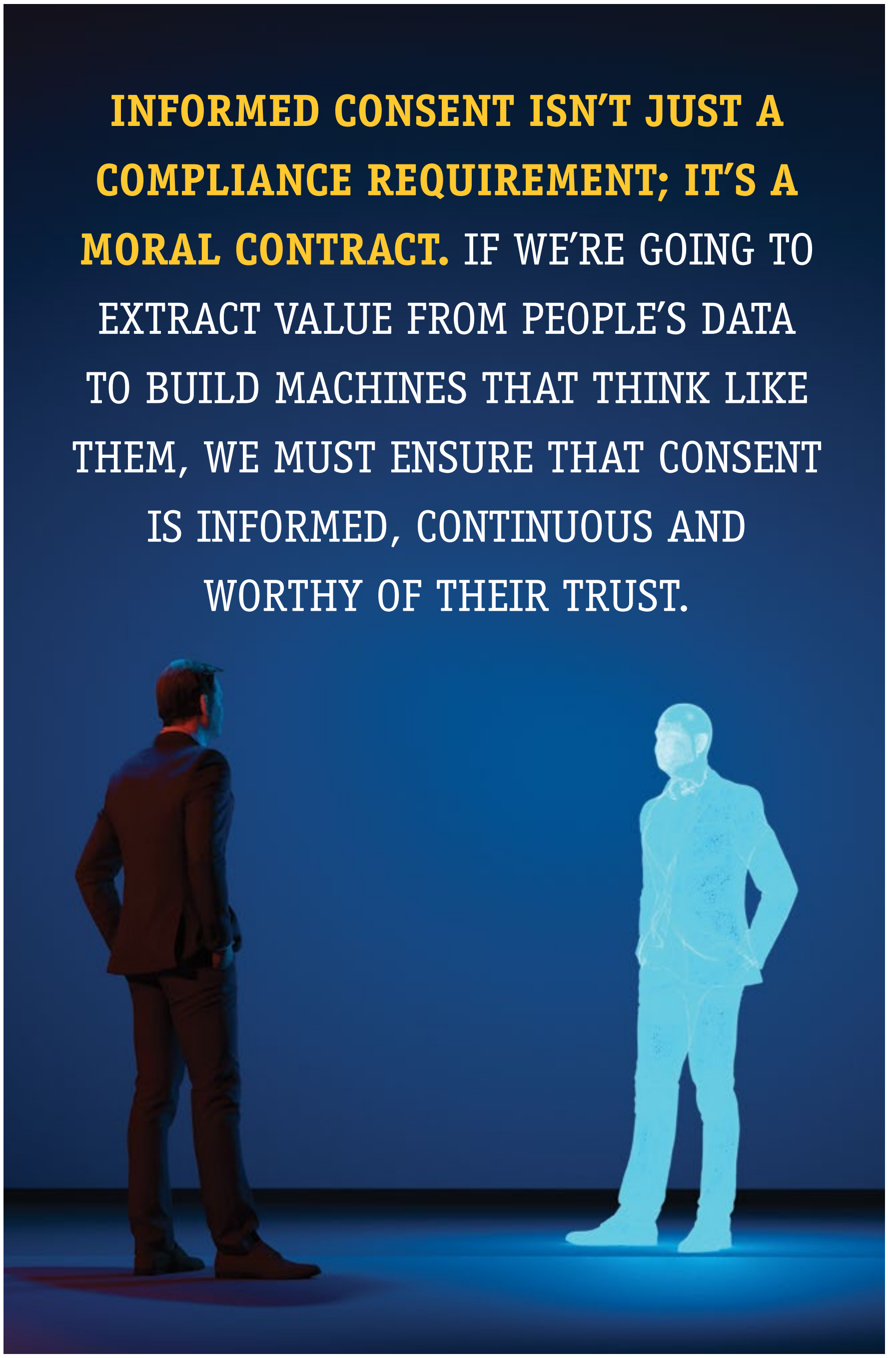
A blueprint for ongoing ethical engagement

One of the most promising frameworks for addressing the limitations of traditional informed consent is the concept of dynamic consent. Unlike static consent where participants grant one-time approval for data use, dynamic consent is a technology-enabled, participant-centered model that fosters ongoing interaction, transparency and control.

This model is particularly well-suited to synthetic data and digital-twin applications, where data may be reused, updated or reinterpreted by evolving AI systems. Dynamic consent transforms the participant's role from passive contributor to active stakeholder.

At the heart of dynamic consent is a secure digital platform, accessible via web or mobile app, through which participants can:

- **Review and manage their consent preferences in real time:** Participants can specify which types of research or data use they agree to and change these preferences whenever they choose.
- **Receive updates on how their data is being used:** If their data is involved in training a new model, used in a secondary analysis or transferred to a partner organization, participants are notified and can choose to continue or withdraw their involvement.
- **Opt in or out of specific studies:** Rather than blanket consent for any future use, participants receive invitations to new research initiatives and can consent (or not) on a case-by-case basis.
- **Access study results or summaries:** In a two-way communication model, researchers can share insights, results or even model outputs with participants – enhancing trust, transparency and participant engagement.
- **Track and audit their own data use:** A log of consent history, changes and interactions provides both participants and organizations with a clear record of data governance, supporting regulatory compliance (e.g., GDPR, HIPAA).



Synthetic data systems, particularly those trained on real behavioral data, are not static entities. They evolve. They update. They are deployed in new ways and sometimes reused for purposes unimagined at the time of original data collection. This reality demands a consent model that is as dynamic as the systems it governs.

Dynamic consent ensures that participants have agency not just in the moment of initial data collection but across the entire lifecycle of data use and synthetic model evolution. It allows researchers to ethically harness the benefits of synthetic data while preserving the core principle that participants must understand and agree to how their data is used.

Let's not lose the plot

Market research is, at its core, a human endeavor. It's about understanding people – their needs, motivations, frustrations and desires. When we shift toward AI-driven modeling and synthetic simulation, we risk forgetting that the intelligence we simulate is borrowed. Every synthetic model starts with a real person who chose to share their thoughts with us.

We owe them transparency. We owe them agency. And we owe them more than a checkbox on a form that barely scratches the surface of what's at stake.

Informed consent isn't just a compliance requirement; it's a moral contract. If we're going to extract value from people's data to build machines that think like them, we must ensure that consent is informed, continuous and worthy of their trust.

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••• product development research

Going beyond the binary

A refinement of the Kano method

| By Carl Jago

abstract

A three-option framework aims to allow researchers to develop smarter prioritization of product and service features and avoid being trapped by labeling all must-be choices as paramount and misinterpreting performance characteristics in a "more is better" context.

Much of the confusion around Kano method studies can be traced to how the data are labeled, grouped and interpreted, often leading to misdirected prioritization efforts. Our version of the model, which we call User Research International (URI) Kano and will explore here, preserves the elegant two-question structure yet streamlines terminology, trims the response scale for clarity and centers analysis on simple, powerful proportions. This methodology, born from practical application in our quantitative research group and an understanding of Kano's original principles, addresses the common pain points in traditional Kano studies.

No new survey questions are invented; we simply interpret the classic present-vs.-absent pair through clearer language and cleaner math, with the goal of giving product teams a fast, defensible roadmap (see "What we do" sidebar). The URI Kano is designed to be useful when teams need to move beyond basic prioritization to uncover true delighters, manage baseline expectations and make informed decisions in competitive or evolving markets.

The original Kano model brilliantly showed that users do not react linearly to every product or service feature. However, decades of teaching examples that portray "sought-after" as a smooth, more-is-better dimension (when the standard Kano survey uses a two-question, present-vs.-absent design), an often-misleading five-choice answer set and one critically mistranslated category (*atarimae* as "must-be") have seeded considerable confusion.

As shown in the accompanying box, product teams often find themselves forcing Kano results into familiar-but-incorrect schemas, such as automatically prioritizing all so-called must-be items first or misinterpreting so-called performance characteristics as dimensions where more is always better.

Misunderstanding	Risk to Roadmap
Schema mismatch #1: Must-be = absolute table stake. The common translation of *atarimae* as must-be implies an absolute requirement. In reality, *atarimae* merely shows widespread annoyance if absent; it does not inherently prove the product is unusable without it.	Everything inaccurately labeled must-be jumps to the top of the backlog, potentially starving higher-impact product development work.
Schema mismatch #2: The popular more-is-better teaching example. Teams often expect a smooth more-is-better curve for performance features based on this common example. The standard Kano survey, however, typically measures reaction to a single present vs. absent threshold.	Teams may treat a sought-after characteristic as a dimension where more is always better. True tuning requires a separate multi-threshold study.
Curve mythology: Treating sketches as data. Organizations sometimes justify diminishing returns or all-or-nothing investment strategies based on the shapes of theoretical Kano curves that were never actually measured for their specific features.	Budgets are allocated based on folklore rather than evidence derived from the actual user data collected.
Commonly used five-point response scales include overlapping options.	Respondents are unsure which option to select and researchers are unsure what respondents meant when they made their selections.

A user-centric terminology reset

Our research and experience highlighted that much confusion originates from the terminology itself. The URI Kano was designed to adopt clearer, more intuitive labels that directly reflect user sentiment and expectation.

Classic Term	Must-be quality elements
URI Kano Term	Assumed characteristics
Essence	Taken for granted baseline. Presence avoids annoyance (users notice its absence with displeasure); users rarely think about it unless it's missing. These are items whose absence represents a risk.

Classic Term	One-dimensional quality elements
URI Kano Term	Sought-after characteristics
Essence	These are features customers are consciously considering and often compare across products. Presence pleases and absence hurts; the characteristic is top-of-mind during evaluation.

Classic Term	Attractive quality elements
URI Kano Term	Delightful characteristics
Essence	A good surprise. These are not typically on customers' minds until experienced, offering significant positive differentiation potential.

Classic Term	Indifferent quality elements
URI Kano Term	Indifferent characteristics
Essence	Little impact either way

Classic Term	Reverse quality elements
URI Kano Term	Nuisance characteristics
Essence	Presence annoys or absence pleases

The refined three-option Kano question

Q1: "If the product had this characteristic, how would you feel?"

Q2: "If the product did not have this characteristic, how would you feel?"

The URI Kano utilizes a clear, three-option response scale. The concept of simplifying the original five-option scale has been explored by researchers. Notably, Kano himself, in his 2001 paper, "Life cycle and creation of attractive quality," presented at the fourth International Quality Management and Organisational Development conference, suggested a three-option approach ("satisfied," "neutral," "dissatisfied"). This was reportedly to address linguistic nuances when translating the original Japanese five-option scale for English-speaking audiences (Kano, 2001, as discussed by Witell and Löfgren, 2007, and subsequently Horton and Goers, 2019).

Response options (three only):

○ I would be happy
○ I would be neutral/I wouldn't think about it
○ I would be unhappy

Why three options?

Ensures clarity: Our specific wording ("I would be happy," "I would be neutral/I wouldn't think about it," "I would be unhappy") is chosen to directly reflect the core positive, neutral and negative poles of the original five-option scale.

Yields unambiguous data: It eliminates confusing and often misinterpreted options like "I expect it" and "I can tolerate it." Every vote clearly indicates positive sentiment, neutrality or negative sentiment, allowing the math and the resulting story to align cleanly.

Classifies correctly: It keeps both indifferent and unimpressed respondents safely in neutral, preventing their responses from being miscategorized.

Measured values: Proportion happy if present (share choosing "Happy" to Q1) and proportion unhappy if absent (share choosing "Unhappy" to Q2). No mystery coefficients; just straightforward proportions everyone understands.

Note: "Happy/neutral/unhappy" labels have been developed for native-English speakers in Western contexts. If this survey is translated or administered to respondents whose first language is not English, the wording must be reconsidered, just as we have done here in response to the translation from Japanese to English. Word choice itself shapes the measurement.

HOW TO WORK WITH CONTINUOUS ATTRIBUTES

For scalable traits (e.g., battery hours, speed, megapixels), which are often sources of confusion in Kano studies, the URI Kano employs discrete thresholds. Defining these thresholds requires careful consideration of user perception and market context.

Example: Instead of asking about "good battery life," we would test a specific state like: "Laptop delivers 10 hours per charge."

Each defined threshold is treated as its own distinct present/absent question pair. The URI Kano then tells you precisely how users react to that specific state. Fine-grain tuning across multiple levels of a continuous attribute naturally calls for testing additional thresholds or employing a different, complementary study design.

THE URI KANO FOUR-STEP WORKFLOW

Step 1: Anchor

Include at least two known-category "anchor" characteristics in your survey to sanity-check results and provide context.

Step 2: Phrase every characteristic binarily

Ensure each item clearly represents a "had/did not have" state. Focus on a product's abilities, avoiding confounding these with specific implementation details where possible.

Step 3: Field and plot proportions

- Initial analysis involves excluding participants who provided questionable response pairs (i.e., "Happy if present" and "Happy if absent") and then taking note of, but setting aside, nuisance response pairs (i.e., "Unhappy if present" and "Happy if absent").
- X-axis = Proportion unhappy if absent
- Y-axis = Proportion happy if present
- Charting involves splitting the plot by the mean or median of each axis, creating four relative quadrants that indicate the relative qualitative classifications (i.e., assumed, sought-after, delightful or indifferent).

Step 4: Risk-first prioritization

- Prioritize avoiding dissatisfaction: The primary sorting criterion is the "proportion unhappy if absent." This metric directly quantifies the potential for user dissatisfaction if a characteristic is missing. Crucially, this means prioritizing based on the degree of measured negative impact, regardless of whether that characteristic falls into the assumed or sought-after category. A high "proportion unhappy if absent" for a sought-after characteristic signifies a significant risk of not meeting user desires and it should be weighted accordingly.
- Consider upside potential: "Proportion happy if present" serves as a key secondary ranking factor or tie-

breaker, bringing in the potential for positive differentiation.

- Leverage continuous data: This approach emphasizes prioritization based on the continuous nature of the collected data (the proportions) rather than relying solely on the categorical labels. While categories (assumed, sought-after, delightful) provide vital qualitative understanding of a feature's relative nature, the proportion of the customer base who would be happy/unhappy drives the prioritization sequence.
- Integrate business factors: Overlay these user-centric, data-driven priorities with essential business considerations such as feasibility, cost, strategic alignment and market opportunities to form the final roadmap.

More than an importance score

Across our five most-recent Kano studies (~300 respondents each), "proportion unhappy if absent" shows a strong correlation (r = 0.87-0.93) with traditional point-point importance ratings.

"Proportion unhappy if absent" therefore effectively captures the same core priority signal as an importance score. The URI Kano then adds differentiating insights.

Equal "importance" scores can mask huge differences in user expectation and happiness upside. The URI Kano distinguishes features that are merely expected (assumed) from those actively desired and compared (sought-after).

Low "importance" (often meaning users don't spontaneously ask for it) yet a high "happy if present" proportion reveals true differentiation opportunities (the delighters) that are often invisible to simple ratings scales.

WHAT WE DO	WHY IT MATTERS
Adopt plain-language category names (assumed, sought-after, delightful, nuisance). This includes restoring the original intent of *atarimae*. Rather than calling them must-be characteristics, we call them assumed, reflecting Noriaki Kano's own description. The influential English translation of Kano's original Japanese paper mistranslated *atarimae* as must-be.	Teams no longer auto-prioritize every so- called must-be characteristic (a common pitfall stemming from the mistranslation). Instead, they treat them as baseline risks to be understood and managed alongside a proper consideration of potentially higher priority characteristics categorized as sought-after.
Employ a clear, three-option response scale, aligning with the spirit of simplification discussed by Kano and other researchers. Our options ("I would be happy," "I would be neutral/I wouldn't think about it" and "I would be unhappy") are designed for directness and clarity. This approach moves away from potentially ambiguous terms found in commonly used five-point scales (e.g., "I expect it," "I can tolerate it"), which, while aiming for nuance, can introduce challenges in interpretation and categorization (e.g., you can both expect it and like/dislike it).	Every vote is unambiguous. This cleaner math and clearer language ensure the data story aligns directly with user sentiment. This prevents the miscategorization of neutral responses. Our specific wording aims to capture the core positive, neutral and negative sentiments from the original five-option scale poles effectively, building on the principle of simplification.
Adopt a risk-first readout. Our refined analytical approach provides nuanced differentiation, even when initial results appear clustered.	Stakeholders see which characteristics avoid most dislikes (regardless of whether they are assumed or sought-after), which are most likely to win top-of-mind comparisons (sought-after) and which can create most genuine delight.

POTENTIAL BENEFITS

Balanced investment and risk mitigation: Risk-first sequencing (addressing potential for high dissatisfaction first) avoids wasting development resources and ensures basic expectations are met.

Evidence-based funding: No curve mythology; fund features based on clear evidence of user reaction to their presence or absence, not on schemas or theoretical sketches.

User delight unlocked: Systematically identifying and targeting delightful characteristics builds brand loyalty and creates positive differentiation.

Shared language, clearer decisions: Customers, researchers and stakeholders finally speak the same language, leading to more-aligned and confident product strategy.

Roadmap for what to build next

The URI Kano trims jargon, fixes the response scale for unambiguous data and focuses analysis on the clear proportions of users happy with the presence of a characteristic versus the proportion unhappy with its absence. This disciplined interpretation of two straightforward endpoints per characteristic is designed to deliver a risk-aware, evidence-based roadmap for what to build next (and what to skip), empowering teams to innovate thoughtfully and meet user needs more effectively.

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••• data analysis

Clarifying the abstract

Why models matter in marketing research

| By Terry Grapentine

abstract

Developing conceptual models before conducting quantitative research enhances strategic clarity, sharpens the articulation of business questions and ensures that resulting insights are tightly aligned with marketing objectives and decision-making imperatives.

A scientific model is a simplified representation of some aspect of reality, designed to explain observed patterns and predict future outcomes. Consider Newton's three laws of motion. Rocket scientists depend on these laws to navigate the intricate gravitational dynamics of space travel. Newton's equations provide remarkably accurate predictions across vast distances, from launching satellites into orbit to slingshotting probes around planets and steering them toward distant Pluto and beyond. While not perfectly correct – modern physics has surpassed them – they remain "wrong in the right ways," useful within the bounds of most practical applications, such as marketing research.

At its core, a model is a purposeful abstraction – a tool designed to simplify complexity in order to understand, predict or influence outcomes. A helpful analogy is a map. Like a model, a map only highlights information relevant to a specific task or objective. An aeronautical weather map shows pressure systems to guide pilots, not restaurant locations. A GPS map offers optimal driving routes, not cloud formations. Each omits irrelevant detail to sharpen focus and improve decision-making.

This is the essence of abstraction: stripping away the unnecessary to isolate what matters most. In science and marketing research, models function the same way. They capture patterns in marketing phenomena and relationships while leaving out noise. If a model tried to account for every variable, it would be as complex and unmanageable as reality itself. The value of a model lies in its ability to be usefully incomplete.

Specifies the functional relationships

A model represents a defined aspect of reality, clarifying one or more dependent variables – outcomes we aim to understand. For a marketing researcher that could be things such as customer loyalty or new

product adoption. It links them to a set of independent variables hypothesized to drive those outcomes. Crucially, the model specifies the functional relationships that connect these variables, forming the foundation for empirical testing and strategic interpretation.

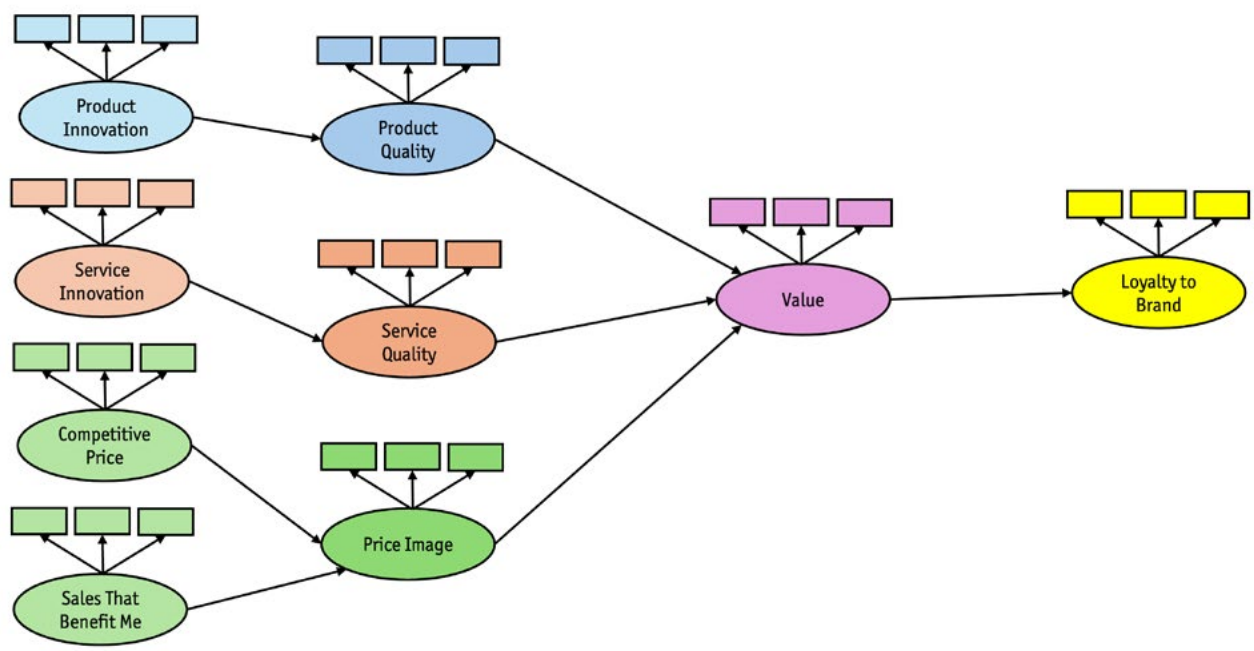
Clients often assume the model is the research's output. We recommend reframing this mind-set. In most engagements, it is more efficient and intellectually honest to begin with a hypothetical model that guides the design of the initial qualitative phase. This preliminary framework, grounded in the client's institutional knowledge and prior experience, serves as a diagnostic tool, not a conclusion.

As qualitative insights emerge, the model can be revised to better reflect the decision drivers and behavioral dynamics surfaced during that phase. It is then empirically tested and refined through the quantitative phase, yielding a final model that integrates managerial intuition with empirical rigor.

It is a misconception that beginning with a model biases the research. On the contrary, it sharpens the inquiry. Comparing respondent feedback to the model's assumptions enhances our ability to detect blind spots, refine constructs and validate causal pathways, particularly when studying complex outcomes such as customer loyalty or brand preference.

Figure 1 presents a simplified customer loyalty model. This structure – an example of a structural equation model (SEM) – specifies direct and indirect causal relationships

Figure 1: Example Marketing Research Model



among key variables, offering a robust framework for explanation and prediction.

The ovals represent concepts that the researcher posits are relevant to the model. The boxes above the ovals denote questions (often image rating attributes) on a survey that measure the concepts. For example, three possible measures of product quality could be brand ratings on durability, component quality and product life.

The arrows pointing from one concept to another denote cause-and-effect relationships between concepts. (See sidebar for a discussion on cause and effect in these models.) For example, consumers' perceptions of a brand on value can influence loyalty to brand. Software used to estimate models of this kind places coefficients near the arrows denoting their relative influence on a dependent variable and a table summarizing each variable's impact on the model's dependent variables.

Qual informs quant

Marketing researchers who create a model based on what they learn in the qualitative phase of a study and then test it in the study's quantitative phase reap many benefits. Doing so:

Sharpens the research question: A model requires the researcher to articulate precisely what is being explained (e.g., brand preference, purchase intent, likelihood to switch) and what might explain that self-reported behavior.

Clarifies assumptions: Modeling forces explicit articulation of theoretical assumptions (e.g., "trust drives satisfaction" vs. "satisfaction drives trust"). This surfaces hidden premises and challenges unexamined beliefs before costly data collection begins.

Anticipates confounding variables and biases: A model helps you consider alternative explanations and potential confounds (e.g., demographic influences, prior brand exposure).

Improves questionnaire design: The model maps constructs to measures, identifying which variables require multi-item scales and which do not belong. This reduces survey clutter, increases validity and ensures every question serves a purpose.

Facilitates replication and learning: Well-specified models create a blueprint that can be tested across different segments, markets or time periods. This supports continuous learning and improvement of both the model and the strategy it informs.

Prepares for appropriate analysis: A model anticipates the statistical methods needed (e.g., regression, factor analysis, SEM), ensuring alignment between research questions, data and tools. This prevents post hoc rationalization or misuse of analytics to chase "significant differences."

Strengthens inferences and decision-making: By testing a well-specified model, researchers can confidently say what is happening and why – a prerequisite for making strategic recommendations. Poorly specified studies often lead to action without understanding.

Facilitates stakeholder alignment: A pre-study model makes the underlying logic transparent to clients or internal stakeholders, ensuring alignment of expectations and reducing misinterpretation of results. This transparency aligns expectations and reduces misinterpretation of results.

Bottom line, modeling before measurement transforms research from data collection to disciplined inquiry. It embeds critical thinking into every phase, clarifying the question, guiding the method and improving the quality of insight.

Don't tell the whole story

"All models are wrong, but some are useful." This quote, attributed to British statistician George E. P. Box, reminds us of the limitations of all models: They are, as we have noted, abstractions of reality. They do not tell the whole story. Consequently, researchers and their clients must integrate their industry knowledge and background knowledge of fields beyond marketing to apply a model's findings to business decision-making.

Background knowledge refers to the accumulated experience, operational context and domain expertise senior management brings to interpret marketing research models. When applied effectively, it ensures that analytic outputs are translated into actionable business insights.

Consider a B2B churn model developed by a research team. Key predictors include login frequency, support ticket volume, Net Promoter Score, product usage breadth and contract size. Surprisingly, the model identifies low support ticket volume as a strong predictor of churn – a result that initially defies intuition. After all, fewer support tickets should indicate fewer problems.

However, leadership quickly contextualizes the finding. High-value clients typically bypass the formal support channel and engage with dedicated account managers instead.

Interpreting arrows in structural equation models: Why they represent nudges, not certainties

- Observational data limits causal inference. SEMs in the social sciences are typically based on non-experimental data, making it challenging to isolate authentic cause-and-effect relationships.
- Arrows reflect theoretical assumptions, not empirical proof. Model structures are driven by prior theory or expert judgment; the model tests consistency with data, not causality.
- Latent variables are abstract and indirectly measured. Constructs like satisfaction or trust are theoretical and measured through imperfect proxies, adding interpretive uncertainty.
- Multiple models can explain the same data. A well-fitting model is not uniquely correct – many alternative structures can yield similar statistical results.
- Path coefficients indicate influence, not determinism. Relationships are probabilistic; an arrow suggests a directional tendency, not a guaranteed outcome.

In contrast, low-value or disengaged accounts underutilize the product, rarely log in and submit few tickets, not due to dissatisfaction but quiet attrition.

Key insight: Low support ticket volume is not a sign of customer satisfaction; it is a latent indicator of disengagement.

Had this operational nuance been identified earlier, the model could have been specified more precisely. This scenario highlights a recurring pitfall in exploratory research: When foundational qualitative work fails to uncover key business dynamics – whether due to sample bias, insufficient sample size, inadequate research scope, methodological shortcuts, or ignoring qualitative research best practices – model accuracy and interpretability suffer. Robust model-building begins with rigorous qualitative discovery and must be grounded in the enterprise's strategic knowledge base.

In another example, a CPG company develops a model (via a conjoint study) to understand price sensitivity for a new line of premium Greek yogurt. The model finds that price elasticity is surprisingly low. Consumers appear relatively insensitive to higher prices compared to competing brands.

From a purely econometric standpoint, this suggests room to increase price without sacrificing demand. However, applying concepts from behavioral economics flags a different interpretation: The apparent price insensitivity may not be rational economic behavior but rather an instance of the price-quality heuristic – a well-documented cognitive bias in which consumers interpret higher prices as a signal of superior quality or health benefits.

Additionally, the research team identifies loss aversion in qualitative follow-ups: Consumers fear switching to a cheaper brand might lead to lower taste or ingredient quality. This asymmetric risk reinforces brand loyalty at higher price points. Instead of simply raising price, the brand team: 1) maintains price but reinforces quality cues in messaging (e.g., "triple strained," "ethically sourced," "gut health backed by science") and 2) introduces a decoy product at an even higher price point to anchor perceptions (behavioral framing).

Make the model your strategic narrative

Use model creation as a narrative and analytical thread throughout the research process to engage stakeholders by giving them a sense of structure, purpose and evolving insight. Below are key suggestions for leveraging model development from the exploratory research phase to the final presentation.

Start with a hypothetical model as a cognitive anchor. Purpose: To set the stage. How: Introduce a provisional model early in the research process based on background knowledge, prior research or managerial intuition. Why it works: It gives stakeholders a mental framework, shows you're not starting from zero and prompts early engagement by allowing them to react to something concrete. Example: "Here's a preliminary model of what we believe drives brand loyalty. What's missing or misaligned from your experience?"

Use the exploratory phase to challenge and refine the model. Purpose: Demonstrate intellectual humility and analytical rigor. How: Present qualitative findings not just as themes but as evidence to revise the initial model. Highlight new variables, reshape assumed relationships. Why it works: It frames qualitative work as discovery rather than confirmation, which stakeholders find more credible and intellectually engaging. Phrase to use: “The model helped us ask better questions. What we heard surprised us – and reshaped our thinking.”

Guide quantitative design through the evolving model. Purpose: Build confidence in the logic of your study design. How: Show how survey questions, experimental treatments or segmentation logic are directly derived from the revised model. Why it works: It connects the dots between theory and measurement, reassuring stakeholders that the research is purposeful and coherent. PowerPoint slide idea: “From revised model → survey design → testable hypotheses.”

Use the final model as a sense-making tool. Purpose: Anchor the interpretation of results. How: Present final findings as a validated model (e.g., SEM, path analysis, key driver analysis), explicitly showing what matters, how and to what degree. Why it works: It simplifies complex findings into an actionable framework, aligning with executives' thinking about causes, levers and outcomes. Framing: “This isn’t just what we found – it’s how the pieces fit together.”

Make the model the centerpiece of the story. Purpose: Inspire action. How: End the presentation with the model as a strategic map, pointing out which levers are most useful, where to focus resources or how to position the offering. Why it works: People remember stories with structure. A well-crafted model becomes both the story arc and the decision guide. Close with: “Here is the model of how this market works – and here’s what it tells us to do next.”

Powerful tools

Models form the backbone of knowledge creation across scientific disciplines. In marketing research, they serve not as endpoints but as structured frameworks for explaining and understanding marketing phenomena. When integrated with managerial experience and insights from adjacent fields, such as behavioral economics or operations, they become powerful tools for shaping research hypotheses, interpreting results and translating findings into actionable strategy.

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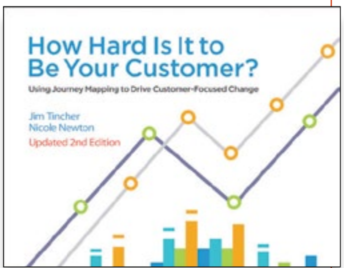

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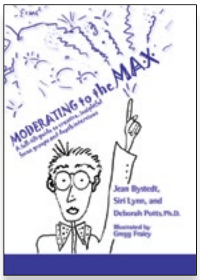

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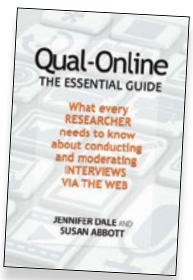

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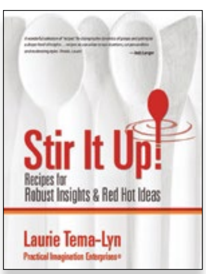

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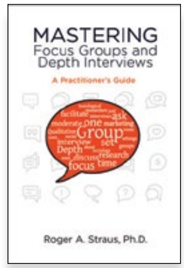

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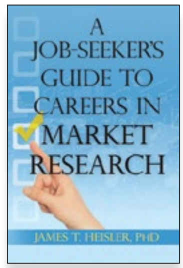

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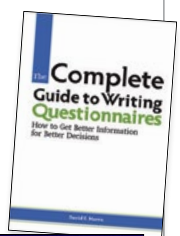

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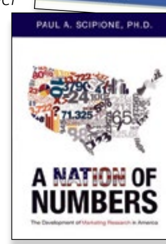

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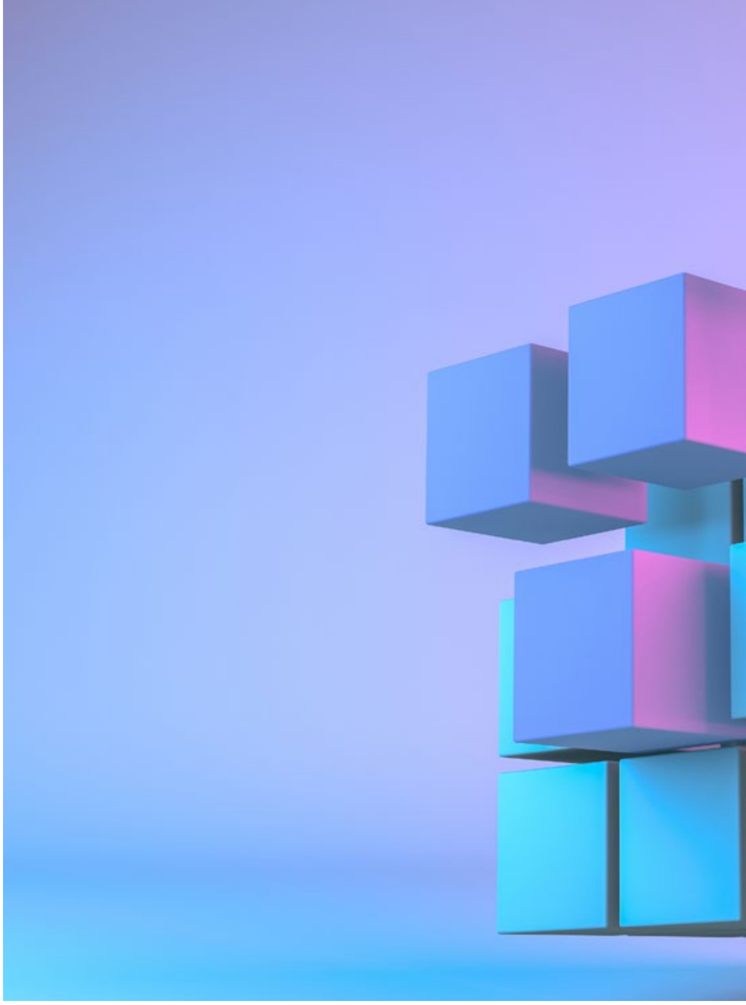


••• ux and ai

New tech, old rules

Why AI needs classic usability principles to succeed

| By Eric Karofsky

abstract

True progress in AI comes from designing for people, not just performance. Discover how foundational usability practices can guide the creation of intelligent systems that feel natural, efficient and indispensable.

AI adoption is one of the most pressing challenges facing organizations today. Despite its transformative potential, the gap between AI's promise and practice continues to widen. In fact, more than 80 percent of organizations aren't seeing a tangible impact on enterprise-level earnings from their use of gen AI, according to a 2025 McKinsey report.

This adoption crisis isn't a technology problem – it's a user experience problem.

The key to successful AI adoption lies in applying proven UX principles that evolve with each technological breakthrough, always keeping human needs at the center.

Why 30-year-old foundational UX principles still matter

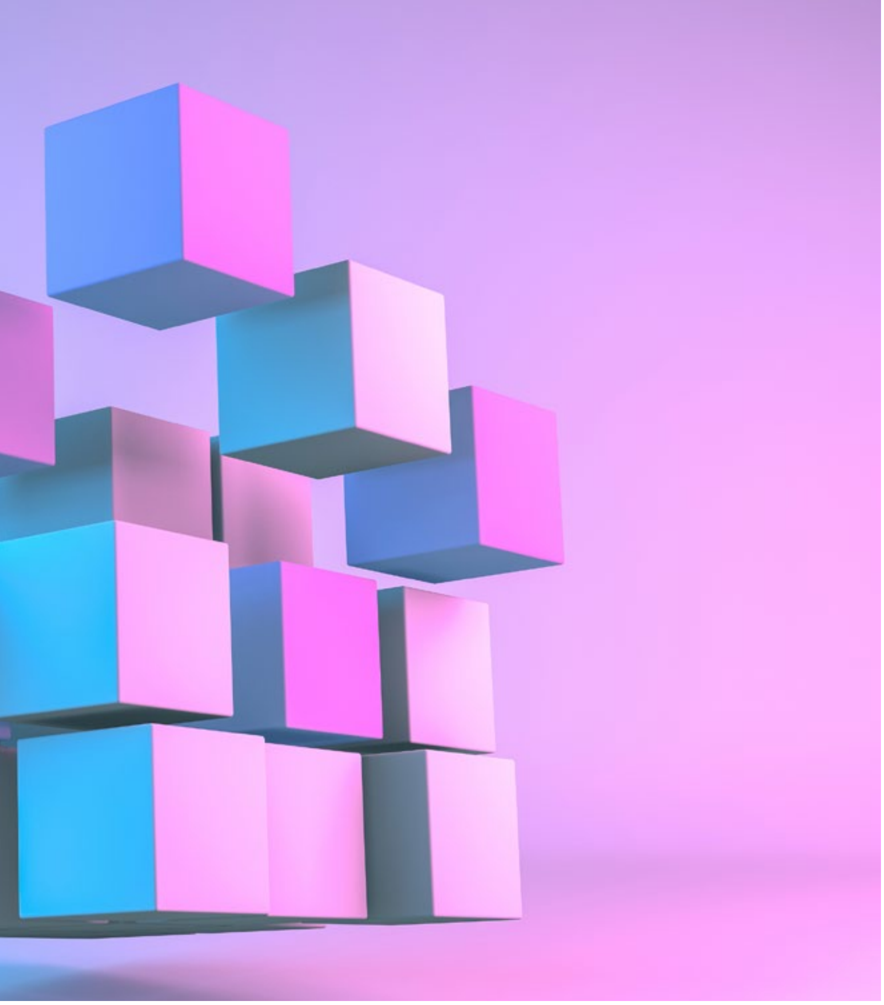
The most successful digital products succeed through exceptional user experience design. Four foundational UX principles from the last 30 years remain essential to AI adoption today:

- Intuitive – users can navigate without extensive training.
- Efficient – tasks are completed with minimal friction.
- Consistent – interfaces behave predictably across platforms.
- Forgiving – mistakes are easily corrected.

Consider:

Apple's iPhone interface exemplifies human-centered design perfectly. Scrolling through apps feels natural and responsive (intuitive), tasks like sending messages or making calls happen with minimal taps (efficient), the same gestures work across all apps (consistent) and the undo function lets you easily reverse mistakes (forgiving).

With Amazon's one-click purchasing, buying something requires just a single click (efficient), the process is self-explanatory (intuitive), it works



the same way every time (consistent) and order cancellation provides an easy escape route (forgiving).

These UX principles dominated desktop software and early mobile applications, creating the foundation for digital adoption we rely on today. Their success stemmed from prioritizing user behavior and cognitive patterns over technical complexity, a lesson that remains crucial for AI adoption.

Voice interfaces changed UX

When Amazon launched Alexa in 2014, it demonstrated how adapting UX principles to new interaction paradigms drives adoption. Voice interfaces couldn't rely on visual cues. They needed UX design that understood how humans naturally communicate. This breakthrough introduced four evolved UX principles:

- Contextual – understanding situational awareness like humans do.
- Conversational – natural language interaction that mirrors human dialogue.
- Reliable – consistent voice recognition and response.
- Personable – human-like personality and warmth.

Consider how Alexa transformed the smart-home experience by adapting to human communication patterns. Rather than opening an app to adjust your thermostat, you simply say, "Alexa, it's too cold in here." The system understands context (your location, current temperature, time of day), processes natural conversation, reliably executes the command and responds with personality: "I've set the temperature to 72 degrees. Stay cozy!"

This user experience breakthrough achieved smart-speaker adoption in 82% of U.S. households by 2023, proving that when AI products apply solid UX principles to match human communication patterns, adoption accelerates dramatically.

Generative AI brought on new UX requirements

The emergence of ChatGPT and generative AI tools introduced capabilities that seemed almost magical – machines that could write, create and reason like humans. However, their adoption success depended on applying sophisticated UX principles that made complex AI feel approachable and trustworthy. This era demanded four advanced UX principles:

- Deep – sophisticated understanding beyond surface-level inputs, matching human comprehension.
- Coherent – maintaining logical consistency across complex outputs like human experts.
- Adaptive – learning and adjusting to user preferences over time.
- Explainable – providing transparent reasoning for decisions in human-understandable terms.

Imagine generative AI as an expert craftsperson who doesn't just follow blueprints but can design entirely new structures in partnership with humans. When you ask GPT-4 to write a marketing strategy, it doesn't just string together keywords, it understands your industry context (deep), maintains strategic consistency throughout the document (coherent), adapts tone based on your previous interactions (adaptive) and can tell you why it recommended specific tactics (explainable).

The most successful generative AI implementations focus on UX design that augments human creativity rather than replacing it, creating a collaborative experience that feels natural and valuable to users.

How humans win in this collaborative AI UX era

Today's emerging AI implementations, from code completion tools to intelligent writing assistants to creative design platforms, represent a fundamental shift in UX design philosophy, from AI as tool to AI as collaborator. This evolution demands four cutting-edge UX principles that prioritize user agency and creativity:

- Proactive – anticipating human needs before they're expressed.
- Co-creative – true partnership in ideation and execution with humans.
- Synergistic – combined human-AI output exceeds individual capabilities.
- Aware – understanding human workflow context and team dynamics.

Consider GitHub Copilot's UX design for software development collaboration. Rather than waiting for specific commands, it proactively suggests code completions based on user coding patterns (proactive). It doesn't just generate code, it collaborates with developers to solve complex problems while preserving user creative control (co-creative). The resulting code quality often surpasses what either human or AI could produce alone (synergistic). And it understands the broader codebase context, suggesting solutions that fit seamlessly with existing user-designed architecture (aware).

Development teams using Copilot report 55% faster coding speed and 88% increased job satisfaction, demonstrating how well-designed collaborative AI UX principles drive both productivity and adoption.

The future of autonomous AI UX

As we enter the era of autonomous AI, from Waymo's self-driving vehicles to Amazon's robotic fulfillment centers, we're witnessing the emergence of four critical UX principles that maintain user trust and control even when AI acts independently:

- Accountable – clear responsibility chains for AI decisions that users can understand.
- Reliable – consistent performance in high-stakes scenarios affecting user safety.
- Configurable – adaptable to diverse user preferences and operational requirements.
- Transparent – explainable decision-making processes that users can monitor and trust.

Waymo's autonomous vehicles exemplify these user-centered UX principles in action. Every decision is logged and traceable for user oversight (accountable), with 88% reduction in property damage claims and 92% reduction in bodily injury claims compared to human drivers, protecting user safety (reliable). Fleet operators can configure routes and behavior parameters to match user preferences (configurable), while passengers can understand why the vehicle chose specific actions through clear communication (transparent).

The key insight: Even autonomous AI succeeds only when it maintains excellent UX design that preserves user agency, trust and understanding.

The UX foundation of AI adoption success

The evolution of AI demonstrates a fundamental truth: Successful AI adoption isn't about technological capability, it's about applying excellent UX principles that evolve with technological capability while always prioritizing user needs, behaviors and values.

Each era of AI advancement has succeeded not by showcasing technical prowess but by applying UX design that makes AI feel more intuitive, more collaborative and more aligned with how people naturally think, communicate and work.

Here are four immediate action steps for UX-driven AI adoption:

1. Audit your current AI initiatives against these evolving UX principles for AI adoption.
2. Identify which AI UX era your products currently inhabit and plan your evolution with users at the center.
3. Invest in UX research to understand how your audience naturally interacts with AI at each stage.
4. Develop measurement frameworks that track both technical performance and user satisfaction, trust and adoption.

Will your company be the one?

The companies that will thrive in the AI-driven future won't necessarily be those with the most advanced algorithms. They will be the ones that master the art of AI UX design through thoughtful, user-centered product experiences. The question isn't whether AI will transform your industry. Instead, will your company be the one that applies excellent UX principles to make that transformation feel natural, valuable and inevitable for the users you serve?

The future belongs to organizations that don't build just AI products. Rather, they will craft AI user experiences that people genuinely want to adopt because they feel designed for user success. Human-centered thinking and design will accelerate AI adoption for those businesses and applications ready to make a lasting impact.

Eric Karofsky is founder and CEO of VectorHX. He can be reached at ekarofsky@vectorhx.com.

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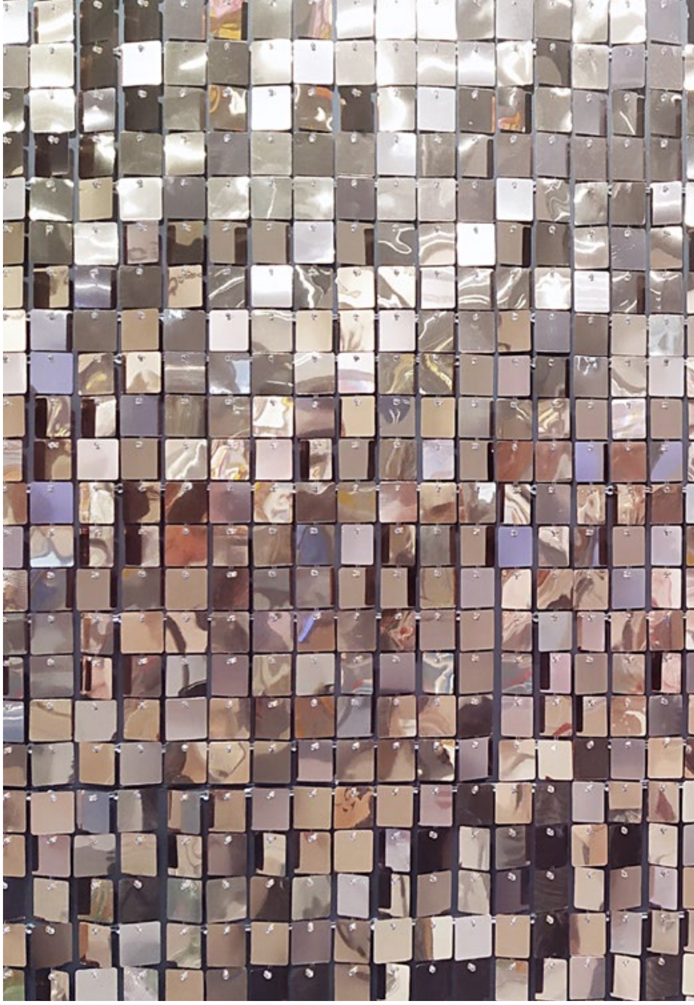
Reflections in a digital mirror

The case for synthetic data

| By Rajan Sambandam and Oded Netzer



abstract

The use of synthetic data has generated considerable heat (but not as much light) in the consumer insights world. While we should not be fully replacing human respondents anytime soon, there is enough evidence to make a strong case for certain uses of synthetic data.

Let's start at the most basic level with the need for consumer insights. It's a truism that uncertainty impedes decision-making. Hence, business research is a process for reducing uncertainty enough to help make decisions. Insights research generally proceeds as a series of steps with the number of steps depending on the amount of information at hand and the degree of uncertainty. But it also depends on practicality, whereby business decisions are often made with less-than-desired information. In some cases, research is not even attempted because of perceived hurdles and decisions are simply based on intuition or existing knowledge/perceptions.

For instance, in a domain with high uncertainty the resolution of the business problem could start with analyzing secondary data (assuming availability and access, which in many cases is absent). This could be followed by a round of qualitative research to investigate the domain, generate ideas and draw boundaries. Next up could be an exploratory quantitative study to flesh out and understand generalizability of concepts, followed by a test of features and segments and finally perhaps message testing.

But the business decision maker often does not have the time, resources or patience for all these stages. As a result, steps are eliminated or condensed, leading to suboptimal business decisions. In much consumer research practicality (budget, time) means that often a single step (such as a survey-based quantitative study) is the only one used. With a bit more luxury, a qualitative stage may be included. While experienced researchers know that uncertainty can be reduced through several means and steps, there is just no way to do it within time and budget.

Now, a skilled marketing researcher – particularly one who specializes in a specific domain (such as health care) or a specific marketing research tool (e.g., conjoint analysis) – can leverage their vast experience to reduce effort by providing meaningful priors that may bypass some of the earlier

steps in the research process, such as testing for appropriate closed-ended responses to a question. If we think about gen AI as an agent that has read thousands of marketing research reports as part of its training data, it becomes clear that it has the potential to match or even exceed the expertise of an experienced marketing researcher. After all, gen AI has likely reviewed more conjoint analysis studies than even the most seasoned professionals.

Imagine complementing this vast knowledge with primary data collected specifically to further train the gen AI tool to respond in ways that closely mirror human reasoning. This is exactly what synthetic data is used for. Now, just like we would not replace primary data collection for marketing researchers' expertise, we would not forgo human data for synthetic data but that doesn't mean it can't be useful in reducing uncertainty.

The number of pathways that can be explored with synthetic data is significantly higher than in normal practice. For instance, when testing a concept, we could explore reactions of many segments, refine the concept in different ways (pricing, packaging, positioning, etc.) and develop contextual understanding of the concept's fit into the overall portfolio and brand. The friction of practicality that prevented a researcher from fully executing the mind's vision can be eliminated when using synthetic data. However, there is no free lunch – the ability of synthetic data to provide meaningful information is something that still needs to be rigorously explored and tested.

In sum, properly developed synthetic data allows us to execute far more steps in the research process, which can lead to significantly improved outcomes with little added time or cost. Synthetic data (done well) has the potential to reorient the entire field and provide much better insights for decision-making.

Only go so far

Now, it's not that the value of synthetic data was previously unknown, just that execution wasn't easy. Simple forms of synthetic data have been created and used for many years (initially for statistical model testing and later for training machine-learning algorithms). But creating sophisticated synthetic data that vary across dimensions in human-like ways is difficult. Even sophisticated simulations (as in conjoint analysis) can only go so far.

The recent revolution in gen AI has now provided a solution that is orders of magnitude better. Simply put, a large language model (LLM) is a complex network that has ingested an enormous amount of information, can connect the information pieces logically and, crucially, can communicate in simple human language.

So, the simplest way of generating synthetic data is to ask an LLM to do it by defining sample criteria ("65-year-old female, with moderate income, living in the South"). Though easy, it is just a starting point and quite an inadequate one at that. As you can imagine, profiles of such consumers can vary quite a bit with respect to almost any attitude or behavior. LLMs are more powerful when fine-tuned in some form. That is, when they are provided with contextual information (which could be qualitative or quantitative) their performance tends to improve significantly. So, in this case, further context about the respondent in question can allow the model to better mimic their behavior.

Mimic the behavior

Even with additional context, while synthetic respondents in the form described above can generally answer survey questions, their ability to truly mimic the behavior of specific populations or even segments has been found to be limited. A more sophisticated version, called digital twins, does it at the individual level with appropriate input.

The idea of digital twins is also not new. It started in the world of hardware in the early 2000s with the term itself being coined initially by NASA in 2010. Applications could include, for example, creating a digital version (or twin) of an aircraft engine to test and predict performance problems in the physical engine, or building a simulation of the New York subway system to allow analysis of alternative malfunction scenarios. The term "digital twin" in this context is very appropriate. However, when translated to the insights world we begin to see some problems.

Digital twins of individual customers can indeed be created and the creation used in much the same way as in the hardware case. So, in the above example, it could be the development of a digital twin of a specific 65-year-old female (called Sue) with a specific income, living in a specific location in the South. However, the replica is incomplete. A proper digital twin would be complemented with additional information about Sue, like her purchase patterns, attitudes and lifetime experiences that may impact her decision-making, much like the way a digital twin of the New York Subway system is fed the entire history of the system's behavior in the past. But human behavior tends to be even more complex as it is affected by inherent human irrationality and unexpected changes in behavior.

Taken together, it means that predicting the responses of an individual consumer is very uncertain and highly variable. For example, a specific consumer can be predictably loyal to a brand – until she is inexplicably not. But she could also be wholly unpredictable with regard to other attributes, sometimes even making decisions subconsciously. As research is beginning to show, it is possible to produce digital twins with reasonable levels of predictive accuracy (within tested domains), but it would be impossible to truly replicate an individual consumer.

With marketing research beginning to explore the potential of digital twins, we should not ask whether we should use them, but rather when and how. What type of data is needed to train gen AI to respond in ways similar to humans and what kinds of questions can it realistically answer? To set expectations, at least in its current form, we believe that the answer to when we can use digital twins, even when well developed, is within a fairly limited scope of questions.

For example, imagine feeding gen AI a consumer's supermarket purchase history. Like many statistical models, it should perform well in predicting the consumer's future purchases of existing products. In such cases, we might be able to use the digital twin almost as if it were primary data, provided the results demonstrate sufficient accuracy. It may even be capable of predicting the likelihood of purchasing a slightly modified new product, such as a new variant of a laundry detergent. But what about an entirely new product, which is often the primary focus of marketing research? While the predictions might not be perfectly accurate, they could offer a valuable starting point for exploration, much like the initial exploratory phase of the research process. An additional question to consider is not only whether digital twins can capture average behavior but whether they can capture the heterogeneity in consumer behavior at the individual or, most likely, at the segment level.

Individual vs. group

The solution lies in what statisticians and insights researchers have known for many years. Modeling and predicting individuals is hard but doing the same for groups is easier. In fact, in most business applications, it is not the individual customer that matters but the segment, as marketing targets the latter. Though we prize individual-level data (as in conjoint utilities) we don't really care about it beyond data collection and parameter estimation. Analyzing segment-level patterns and making segment-level predictions is often the business priority. (Yes, there are cases, such as Amazon, where individual targeting is used but that type of data and modeling is outside our scope of discussion.)

So, in that sense, the term "digital twins" is not entirely appropriate. While we may want to model Sue we don't really care about Sue once the modeling is completed. We care about the attitudes of the segment that she belongs to (however it may be defined). The trick is to start at the level of Sue and then aggregate people like Sue into an opportunity segment that can be useful for a business decision-maker. Apart from being sound modeling practice this also has the virtue of helping reduce (though not eliminate) some of the privacy considerations that arise with consumer digital twin development.

The value of human data

Let us be clear about what we are not saying here.

We are not advocating for the substitution of human data with synthetic data (as some of the heat generated by online arguments suggests). Use of human data is the primary goal. The use of synthetic data is to help reduce uncertainty, refine concepts and reorient research such that the study with real human data has the best chance of succeeding. Synthetic data is a means to easily leverage existing knowledge through a familiar format, as well as develop ideas thoroughly before using precious and scarce human data. Specialists as varied as surgeons and astronauts practice and refine their technique in simulations of reality. Synthetic data offers a similar luxury for insights professionals.

Let's address a specific – and inappropriate, in our mind – use case that some people advocate for synthetic data, namely, employing it to complete a desired quota group especially for hard-to-reach audiences. So, for example, let's say 200 completed surveys were required but lack of sample availability (and other problems) led to only 170 completed and validated human surveys. Could 30 synthetic respondents be added to get to the target quota of 200?

To see why this use case is not appropriate, one should ask the question of why, and what we accomplish by doing this augmentation. One straightforward way to think about it is in terms of margin of error. It's true that the error with 200 is (slightly) lower than 170. But why stop at adding 30? Why not add 300 or 3,000 or more? Clearly cost and timing are not issues.

This leads to the fundamental flaw. Margin of error (or sampling error) reflects the gap between sample and population. That's why a census requires no statistical testing as the error drops to zero when sample equals population in size. But the sampling precision offered by synthetic data is an illusion. Augmenting human data with synthetic data masks uncertainty rather than reducing it and risks distorting insights rather than enhancing them. Without a firm grasp of these principles researchers can make mistakes that could undermine the integrity of the research itself.

This objection is statistical and does not even consider that (as discussed earlier) synthetic data are generally inferior to human data. Models know past patterns but not necessarily future intentions, especially with regard to new features that may interest people. Models are also only trained up to a certain point in time, which can limit their horizon with regard to real-world events.

Keeping synthetic and human data separate allows each one to operate in its best zone. In fact, while the term "synthetic data" is commonly used, we agree with the critique that it is not really data in the traditional statistical sense of the word, just as simulations are not really data. But that does not negate their usefulness in any way, as we have discussed in this article.

High barrier for excellence

As aptly explained in a recent article in the journal Science, LLMs can be seen as a convenient way for humans to take advantage of information that other humans have accumulated. With convenience comes a caveat – synthetic data have a low barrier for entry but a high barrier for excellence. It is not always clear that a significant amount of thought and work is required to develop synthetic data that can help rather than hinder the process of obtaining superior consumer insights. The main tenet of marketing research – uncertainty reduction, rather than cost reduction – should not be forgotten.

We should resist the temptation to use synthetic data simply because it is nearly costless. Bad marketing research will eventually turn out to be very expensive. Instead, we should ask ourselves how we create proper synthetic data and for what questions it can meaningfully help reduce uncertainty. Among the variables to consider are: type of model used; prompting protocols; input information used; and the extent to which outcomes can be extrapolated. There is a considerable explanation underlying each of these (and other factors). We recommend reading the quickly evolving academic literature about the potential of using synthetic data (such as Blanchard et al.) for more detail.

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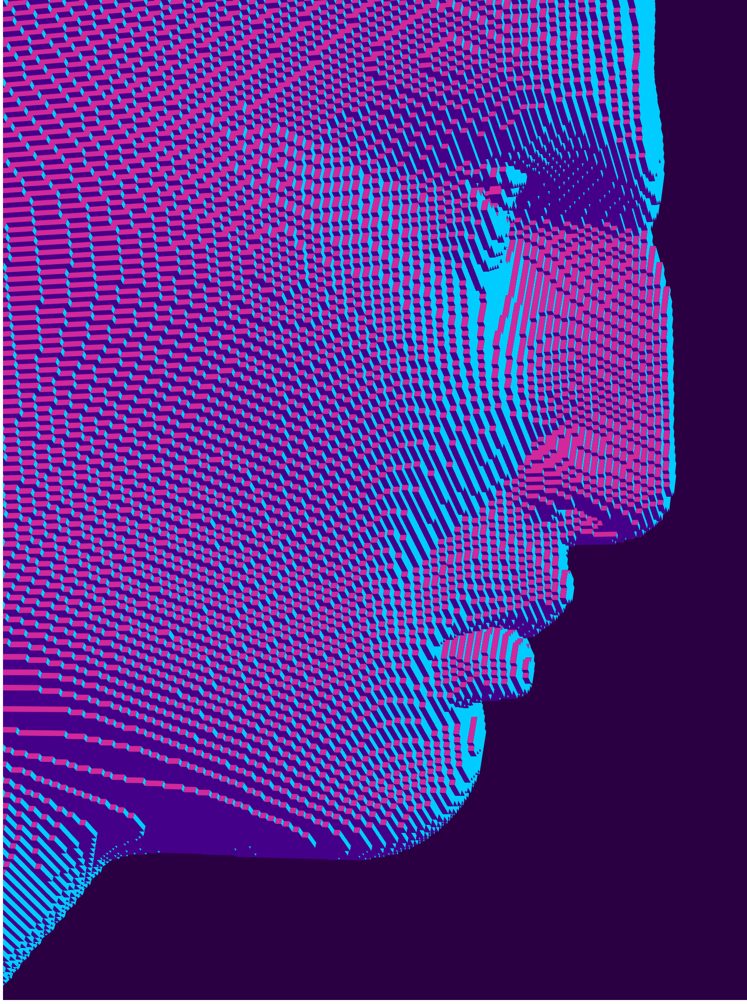
••• data quality

Can AI stop AI?

Why online surveys need penetration tests

| By Sebastian Berger and Bernhard Witt



abstract

Advanced AI bots can slip past traditional survey checks. Inspired by IT penetration testing, the authors simulated attacks to expose weak points in quality controls and found that survey pentests can offer a proactive strategy to safeguard trust in online research data.

Penetration tests, or pentests, are the gold standard for uncovering vulnerabilities in IT systems. While preparing our research paper for this year's ESOMAR Congress, we deliberately tried to break survey quality checks. This raised an obvious question: Why doesn't the survey industry use penetration tests?

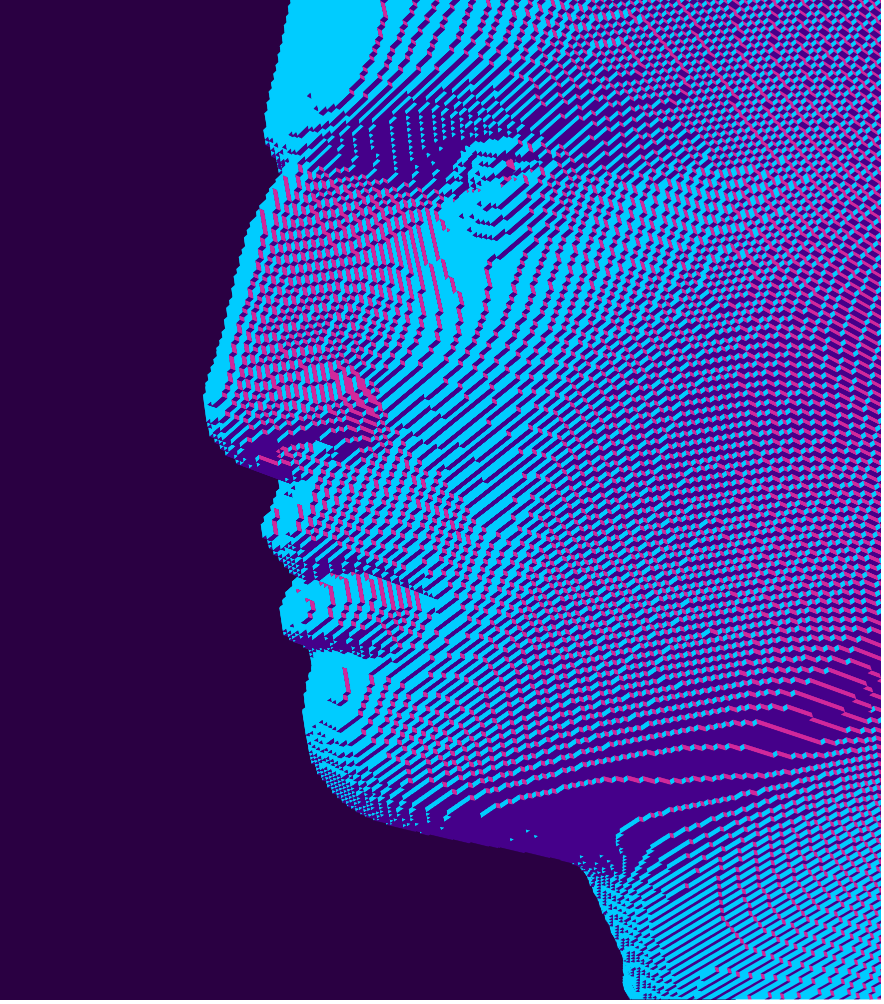
The parallel is clear. Just as IT pentests expose vulnerabilities before attackers exploit them, survey pentests could reveal weaknesses in data quality controls before fraudsters take advantage of them. Introducing such a practice could help restore trust in online surveys at a time when the industry faces a serious data quality crisis.

It may sound unusual that we tried to break survey quality checks but our goal was to find out whether AI can stop AI from faking surveys. This effort was inspired by recent research showing that no single method reliably prevents bots from completing surveys undetected. This research makes one thing very clear: The main challenge in survey fraud prevention today is no longer catching inattentive or fraudulent humans; it is detecting and stopping advanced AI-driven bots.

Our work set out to examine whether our recently published recommendation, which combines AI-powered coherence checks with a content- and behavior-based analysis of open-ended responses, can stop even the most advanced AI bots from faking surveys.

From cybersecurity to survey security

In cybersecurity, a penetration test is a controlled attack that simulates real adversaries in order to uncover weaknesses under realistic conditions. The same principle applies to surveys. What matters is not whether a single quality check works on its own but whether the entire system holds up against an adversary who is actively trying to defeat it. Our experiment applied this idea by gradually escalating attacker capabilities and expos-



ing the points where quality controls break when faced with determined, AI-assisted fraud.

We began with a simple automation bot that raced through a custom questionnaire, filled open-ended questions with placeholder text and failed every layer of defense. Next, we integrated a large language model to generate plausible open-ended responses. The content became more convincing but these entries were still flagged as bot-written. We then added a humanize function that reduced AI text detection and made the wording appear more natural. Yet, because the text was still entered artificially, behavioral analysis continued to expose the bot. By simulating keystrokes with pauses, corrections and reading delays and after several iterative adjustments we managed to bypass the behavioral layer. In the final step, we turned the bot into a fully autonomous AI agent that answered all question types coherently and used a synthetic persona to maintain internal consistency throughout the interview. At this stage, the agent became very difficult to detect.

Why surveys need pentests now

This is not a reason to panic. Our experiment was a stress test, using insider knowledge and significant effort to deliberately bypass even the most advanced defenses. In real-world conditions, such a coordinated attack is rare.

The key lesson is that no system is completely unbreakable. Given enough time, skill and resources, any fraud detection can eventually be circumvented. This is precisely the point. If defeating the system requires disproportionate effort, fraud becomes economically unattractive. It is like spending months digging a tunnel into a bank only to steal a few thousand dollars. The cost of the attack simply outweighs the potential gain.

What should you do? Think of the burglar analogy. Your door does not have to be indestructible; it only needs to be more secure than your neighbor's. In our industry, this means that those who adopt robust quality controls early are the ones who remain better protected. This shifts the question away from whether your survey is theoretically vulnerable and toward understanding where and how it is vulnerable in practice. A survey pentest provides exactly that insight. By simulating increasingly sophisticated attacks on your online survey, from simple automation scripts to fully autonomous AI agents with coherent personas, a pentest uncovers the precise combinations of questionnaire design choices and quality checks that allow non-human interviews to slip through.

The result is a quantified and reproducible account of failure points that can be addressed and then retested, just as security teams do after an IT penetration test. This approach turns survey quality assurance from an abstract promise into a measurable, verifiable standard.

A clearly defined target

A well-designed survey pentest follows the same escalating approach as our experiment while respecting the realities of research operations. It starts with a clearly defined target, usually a specific questionnaire on a given survey platform. The pentest team first uses a simple automation bot to probe speed rules, minimum engagement thresholds and basic trap items.

Next, AI-generated open-ended responses are added to test content filters and language-based detectors under different prompt styles. The process then simulates human interaction by reproducing keystrokes, natural typing delays, reading pauses and corrections to evaluate behavioral analytics on both desktop and mobile devices.

The fourth stage introduces a coherent AI agent that answers grid, single-select and multi-select questions as well as open-ends in a way that is logically consistent throughout the interview. The final stage assigns the agent a synthetic persona to ensure cross-item plausibility, which in our experiment was the point where detection became very challenging.

The result is a comprehensive narrative report that includes evidence traces, pass-fail matrices for each layer, likely root causes and prioritized recommendations. These recommendations typically focus on strengthening the questionnaire's ability to generate interdependent quality signals, for example by adding opportunities for coherence evaluation and crafting open-ended questions that elicit behaviors revealing advanced AI-driven fraud. They also address analytics, combining content, coherence and behavioral data into calibrated quality scores with conservative thresholds.

A follow-up pentest then verifies that the identified vulnerabilities are effectively closed under realistic attack conditions.

The bottom line for research leaders

Our research shows that the fight against survey fraud is increasingly similar to the fight against computer viruses. It requires constant adaptation. New fraud techniques must be tracked and countered in real time and detection systems need continuous refinement, expansion and reevaluation.

There is no single check that reliably detects all forms of fraud. What works today may fail tomorrow. Every individual method can be bypassed. Digital fingerprints can be faked with manipulated metadata and behavioral checks can be fooled by simulating human-like input patterns.

Only a layered defense that combines metadata, content-based analysis and behavioral checks can reliably catch advanced fraud. The solution is not a single silver bullet but an ongoing process that treats quality as a living system, something to be challenged, measured and improved.

Pentesting your surveys removes the guesswork from this process. It shows where defenses fail under real attack conditions, guides concrete improvements and gives your teams and clients confidence that your data is strong enough to support critical decisions. This is what credibility requires in the age of AI and it is possible today if we test ourselves before fraudsters test us.

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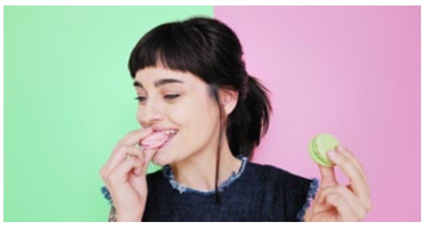

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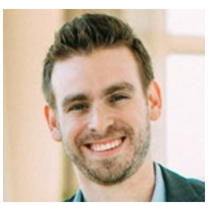

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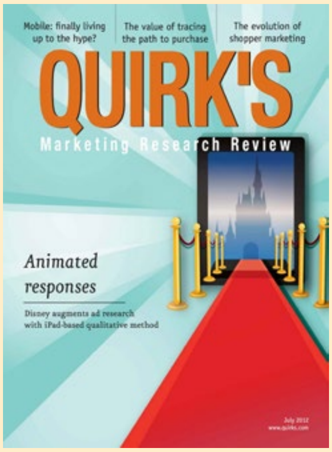
QUIRK'S TIME CAPSULE

Facts and findings from nearly 40 years of Quirk's



The start of cross-platform interactions

We're all familiar with social media symbols, but a 2012 Survey Monitor entry titled "Consumers OK with cross-platform calls to action," reported on consulting firm Accenture's study of the then-increasing use of social media presence on TV. Forty-three percent of participants said their greatest motivator for interacting with a social media symbol while watching TV was to obtain more information about a show, product or service. Others pointed to getting coupons or promotional codes (32%), entering a contest/ sweepstakes (31%), interacting with the show or product on social media (26%) and connecting with others with similar interests (21%). One-third of U.S. consumers interacted with the symbols while watching TV by Liking the TV program on Facebook (20%), scanning a QR code (11%) or searching for the hashtag on the former Twitter (7%). Of those who did not interact with social media while watching TV, 60% said it was because they did not think they would be interested in the content. Others were not sure how to interact with social media symbols (23%) or had not downloaded the needed app for scanning social media symbols on their mobile devices (15%).

2012

Mobile research goes mainstream

The July 2012 magazine published a handful of articles about mobile research. In the article "Why your research strategy needs mobile," Dave King explained that a major difference between the use of mobile surveys and the rise of online surveys was that the researcher consciously chose whether to make online surveys available. "With the massive growth of mobile data usage you can't be sure that the survey links you send out will be opened from a desktop. Many respondents will open the links from a mobile device, so if your survey is only designed to render on a desktop, the overall survey experience for mobile users won't match up," wrote King.

Leslie Townsend's article "Is mobile market research finally living up to the hype?" established that mobile data collection had been steadily growing year by year. Many argued that mobile-based surveys would always be secondary to traditional desktop-based surveys. In 2012, while desktop devices were still more popular among survey takers than mobile and tablet devices, Kinesis Survey Technologies argued that 2012 was "the year of mobile." They backed their claim by stating that mobile device usage represented 25.5% of the firm's overall survey traffic, a figure pulled from the first quarter of 2012.

Entering a new era for media consumption

These days, we don't have to be asked to interact with social media while watching TV. Most of us are already doing it as we consume something else on a larger screen. In the same issue, in an article titled "Why 'mobile' (as we know it) is the wrong focus," Ben Smithee wrote "We have entered an era of second-screen media consumption, where content on the television or big screen will be largely supplemented and paired with second-screen content that is consumed via the mobile tablet and phone device." He argued that to gain a better understanding of consumers, tablet and mobile phone use were the most important for researchers to understand.

Scan to access all Quirk's back issues.

CALENDAR OF EVENTS

••• can't-miss activities

CMO Alliance will host the CMO Summit Chicago on **November 18**. Visit https://events.cmoalliance.com/location/chicago.

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.

ESOMAR will host ESOMAR Connect | Indonesia on **November 19**. Visit https://esomar.org/events/esomar-connect-indonesia-1.

Media Research Group will host the MRG Annual Conference on **November 19-21**. Visit https://mrg.org.uk/events/262.

Merlien Institute will host MRMW MENA on **November 26-27**. Visit https://mena.mrmw.net.

CMO Alliance will host the CMO Summit on **December 2** in **London**. Visit events.cmoalliance.com/location/london.

IQPC will host Agentic AI & Personalized AI 2025 on **December 3-5** in **Barcelona**. Visit www.aidataanalytics.network/events-generative-ai-europe.

TTRA will host the Marketing Outlook Forum on **December 31**. Visit https://marketingoutlookforum.com.

NRF will host NRF 2026: Retail's Big Show on **January 11-13, 2026**. Visit https://nrfbigshow.nrf.com.

Insights Association will host the CEO Summit on **January 20-22, 2026**. Visit www.insightsassociation.org/cv5/cgibin/Eventsdll.dll/EventInfo?SESSIONALTCD=2025CEOSummit.

Customer Management Practice will host Customer Contact Week Orlando on **January 21-23, 2026**. Visit www.customercontactweek.com/ccw-orlando/.

Informa Connect will host The Media Insights & Engagement Conference on **January 27-29, 2026**. Visit https://informaconnect.com/media-insights.

Merlien Institute will host Qual360 EU on **January 28-29, 2026**, in **Berlin**. Visit https://eu.qual360.com.

QRCA will host the QRCA Annual Conference on **February 2-5, 2026**, in **San Antonio**. Visit www.qrca.org/site/2026-conference-central.

Pharma Market Research Conference will host the Pharma Market Research Conference East on **February 4-5, 2026**. Visit http://pharmamarketresearchconference.com.

ESOMAR will host ESOMAR Africa in Focus on **February 3-5, 2026**. Visit https://esomar.org/events/africa-2026-africa-in-focus-turning-insights-into-action.

Merlien Institute will host UX360 Research on **February 4-5, 2026**. Visit www.eventbrite.sg/e/ux360-research-2026-virtual-summit-tickets-1543722558729.

Medallia will host Experience '26 on **February 10-12, 2026**. Visit www.medallia.com/experience.

AMA will host the Winter Academic Conference on **February 13-15, 2026**, in **Madrid**. Visit www.ama.org/events/academic/2026-ama-winter-academic-conference.

Quirk's Media will host the Quirk's Event – Dallas on **March 10-11, 2026**. Visit www.thequirksevent.com

Quirk's Media will host the Quirk's Event – Chicago on **April 15-16, 2026**. Visit www.thequirksevent.com.

Quirk's Media will host the Quirk's Event – London on **May 6-7, 2026**. Visit www.thequirksevent.com.

Quirk's Media will host the Quirk's Event – New York on **July 29-30, 2026**. Visit www.thequirksevent.com.

Event details as of October 1, 2025. Please see websites for more details.

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

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10 minutes with...

Greg Timpany
Business and Insights Analyst, Dairy MAX

"A lesson that I first learned in college applies to researching the Gen Z audience – keep it simple and keep it fun. This applies to all aspects of the research process."

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

What led you to a career in research and insights?

It was my junior year in college, and I was taking my first marketing course. The professor enlisted us to assist in an in-person project interviewing customers at a local swap meet. It was then that I realized I had a curious nature and enjoyed asking questions. This followed with learning to program in SPSS, how to design questionnaires and how to analyze and report on the data.

Do you have any tips for researchers looking to better understand and engage with Gen Z consumers?

A lesson that I first learned in college applies to researching the Gen Z audience – keep it simple and keep it fun. This applies to all aspects of the research process. It is also important to ground yourself in this generation's nuances. There have been plenty of studies documenting how they like to consume media, shop and ultimately buy the products they are interested in.

If you are just entering the Gen Z space, you might consider partnering with an agency – we've used Knit – that specializes in this audience. I worked with Knit to get an assessment of Gen Z's thoughts on chocolate milk as a post-workout recovery beverage. They will tell you to keep your surveys short and to the point – not bad advice for any audience. Given this generation's use of technology, you may also want to incorporate video responses in your survey.

How do you see yourself leveraging AI in the next six months?

I have read and watched too much science fiction to not be somewhat skeptical about AI. With that said, I have used it here and there to help provide foundational knowledge on topics I am researching, such as dietary changes among GLP-1 users. Going forward, I will use AI as a pre-survey design tool to help me focus my thoughts, as well as a theme extraction tool for unstructured data. As with any innovation, you still need human eyes on the output to make sure it aligns with expectations.